DataPhile

STONE
D•E•S•I•G•N

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About DataPhile and this manual...

DataPhile was written by Kristin Jensen and Andrew Stone. It was extensively beta tested by hundreds of devoted users around the globe– John Bartley led the pack, but thanks to each and everyone of you!

This manual was written by Mary Wommack with help from Max Airborne, Smoots, Andrew and Kris.

It was produced entirely on the NeXT computer using Stone Design's Create and DataPhile, Frame's FrameMaker, Keith Ohlf's Grab.

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All data in this manual is fictional, except for Arthur and Ali's pictures which came from a public access FTP site. Any resemblance to persons living or dead is purely coincidental.

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Table Of Contents

Preface: Getting Started

What's Included P-1
What You Should Know P-1
Getting Started P-1

Chapter 1: For People Who Don't Read Manuals

Introduction 1-1
Basic Concepts 1-2
Creating a Database 1-5
Using the Database/Access Mode 1-6
Designing Views 1-10
Backing Up Your Databases 1-13
Hints for Using DataPhile 1-13

Chapter 2: Basic Activities

Introduction to Databases, Records and Fields 2-1
Creating a New Database 2-4

Chapter 3: Defining the Database

Structure and Field Types 3-1
Field Types 3-3
Defining Fields 3-8
Modifying the Database Definition 3-11
Entry Options 3-13
Calculated Fields 3-20

Chapter 4: Use of Views

Overview of Views 4-1
View Types 4-3
Creating Views 4-6
View Parts 4-8
Editing the Contents of Parts 4-12

Chapter 5: Adding Fields and Graphic Objects to Views

Designing Views 5-1
Working with Fields in Views 5-2
Working With Graphic Objects in Views 5-9
Creating Graphic Objects 5-12
Editing Objects 5-17
Arranging Objects 5-20
Zoom 5-23
Inspectors 5-24
Auto Inspectors 5-35
Field Inspectors 5-38
Adding Graphic Objects from Other Programs 5-45
Special Color Controls 5-46

Chapter 6: Accessing the Database

Accessing Data 6-1
Adding and Duplicating Records 6-2
Importing Records 6-4
Entering Data 6-7
Updating Data 6-12
Viewing Data 6-12
Finding Data 6-15
Sorting Data 6-24
Advanced Access Features 6-27

Chapter 7: Labels and Envelopes

Label Report Generator 7-1
Making Mailing Labels-Tutorial 7-5
Envelope Report Generator 7-6
Making Envelopes-Tutorial 7-8
Bar Codes 7-10

Chapter 8: Exchanging Data with Other Applications

Exporting Records To a Text File 8-1
Using DataPhile from Other Applications 8-7

Chapter 9: Menus

The Main Menu 9-1
The Info Menu 9-2
The Database Menu 9-12
The Edit Menu 9-15
The Design Menu 9-18
The Font Menu 9-19
The Create View Menu 9-21
The Layer and Group Menu 9-25
The Access Menu 9-27
The Reports Menu 9-30
The Tools Menu 9-32
The Zoom Menu 9-34
The Windows Menu 9-35
The Services Menu 9-37

Chapter 10: Shortcuts, Backup and Troubleshooting

Command Key Equivalents 10-1
Mouse Shortcuts 10-3
Backing Up Your Data 10-5
What to Expect in DataPhile Version 2 10-6
Troubleshooting 10-6

Appendix A: Calculated Field Components

When to Use Calculated Fields A-1
Calculated Field Formula Components A-2
Functions A-6
Function List and Examples A-7

Preface
Getting Started

What's Included

Included with this manual is a DataPhile disk. This disk contains DataPhile.pkg (a compressed DataPhile application), a DataPhileAux.pkg and a README file with information about the program. The DataPhile.pkg package contains the **DataPhile** application itself and the included template databases and help files. The DataPhileAux.pkg package contains the sample medical conference database that we've used throughout the manual, a sample import file and the **DataPhile** specifications.

What You Should Know

This manual assumes that you know standard NeXT skills, including: working with windows, menus and directories, using scroll bars, using the mouse and mouse techniques such as dragging, manipulating standard NeXT controls like sliders, editing text and the using NeXT color panel. Where appropriate, the manual refers you to various chapters in your NeXT User's Reference Manual. This manual should give you the information you need to make **DataPhile** work for you. However, it is beyond its scope to teach you all you need to know about using databases to organize information. If you continue to find yourself very confused about how to organize your database to accomplish certain tasks, you may wish to seek the help of a qualified consultant or trainer.

Getting Started

If **DataPhile** isn't installed on your NeXT, please read Installing DataPhile below.

Even if you hate manuals, please read Chapter 1. It should give you enough information to begin getting the most out of **DataPhile**.

Installing DataPhile

DataPhile comes as a compressed package that can be installed using the NeXT Installer program.

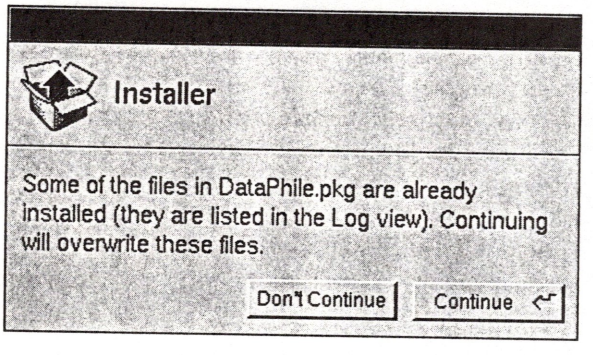
1. Insert the DataPhile diskette into disk drive.

2. If there is room on your shelf, the DataPhile diskette will appear there. Otherwise, the disk will appear in your root directory. Select the disk.

3. Double click on the file "DataPhile.pkg" This will launch the Installer program. Click on the Install button. An Installing dialog box will appear. If you do not choose another directory, **DataPhile.app** will automatically be installed in the ~Apps directory of your Home directory. Or, you can choose to install it into another directory. Choose **DataPhile**'s destination in the directory and click on OK to begin the installation and the Install button to confirm the installation.

   Note: You can install **DataPhile** into any directory for which you have write privileges. However, for the Workspace to recognize its icons, **DataPhile** must be installed in your Apps directory or /LocalApps.

4. If a copy of **DataPhile** already exists in the directory into which you are attempting to install **DataPhile**, the following message will appear. You


Installer
Some of the files in DataPhile.pkg are already installed (they are listed in the Log view). Continuing will overwrite these files.
Don't Continue
Continue

   can choose Continue to overwrite the files. Or, better, choose Don't Continue to return to the main installer window so that you can delete the existing DataPhile package (see Deleting DataPhile in Chapter 10). It is always better to completely deinstall any old version of DataPhile before installing a new one.

5. If no copy already exists or you have successfully overwritten the old copy, you will see a message saying "Installation Complete." Quit the Installer. **DataPhile** is now ready for use.

Using This Manual

Chapter 1 is designed to give experienced database users enough information to explore **DataPhile** by themselves.

Chapter 2 provides some basic information on how to use **DataPhile** such as how to create a new database, how to work with files and windows, and how to create a new database from a text file.

Chapter 3 describes how to define the structure of your database, and includes information on entry options, indexing, and defining calculated fields.

Chapter 4 describes the use of views in **DataPhile**, including descriptions of the three view types and working with view parts.

Chapter 5 describes how to design and modify views, including adding and deleting fields, field formatting, and adding and arranging graphic objects.

Chapter 6 describes how to enter, view, sort and find data.

Chapter 7 describes **DataPhile**'s unique Label and Envelope report generators.

Chapter 8 contains information on how to export data from **DataPhile** for use in other applications such as Improv and word processing applications, and **DataPhile**'s inclusion in the Services menu of other applications.

Chapter 9 provides a description of each menu command.

Chapter 10 contains information on **DataPhile**'s command key equivalents, mouse shortcuts, color techniques, data backup and some trouble-shooting hints.

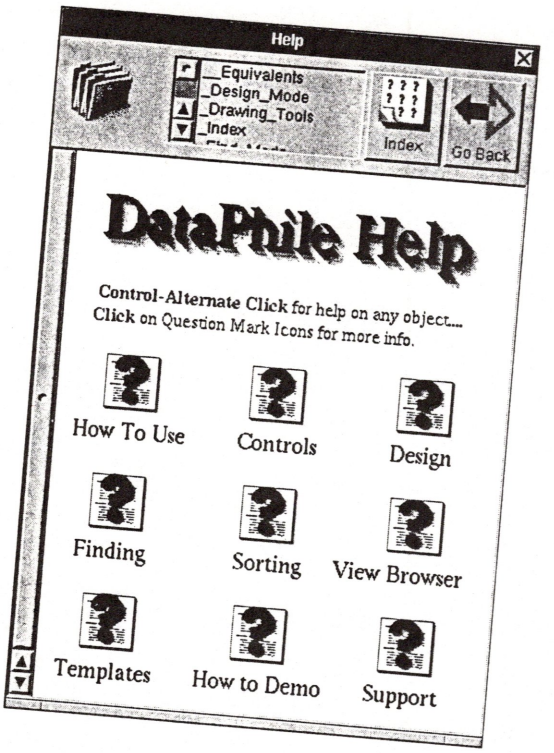
Appendix A provides a complete description of how to use **DataPhile**'s calculated fields and descriptions of all the calculated field functions.

Chapter 1
For People Who Don't Read Manuals

Introduction

DataPhile is a simple sophisticated flatfile database manager with an intuitive and complete user interface. In this section for people who don't usually read manuals, we have included information that you may need to begin using the program. If you are not familiar with databases, read Chapter 2 first for an introduction to databases, fields and records, and then this chapter for an overview of how those concepts are applied in **DataPhile**. You can then refer to more detailed sections of the manual as you need them. If you are familiar with databases, you might want to browse through the sections below to get an understanding of the concepts applied in this particular database application and then look at the Hints at the end of this chapter for tips that will help you understand **DataPhile**.

Also, you can access **DataPhile**'s detailed on-line Help system at any time. When you want information on a particular topic or subtopic, hold down the Alternate and Control keys and click on a control associated with it. A Help window will appear with information on that item or an index to the help system. **DataPhile** tries to figure out what information you'd like by looking at your last action. If it involves a particular panel, **DataPhile** will present information on that panel.



When you want information on a particular topic or subtopic, click on one of the question mark icons to navigate to this subject. You can also click on a topic in the scrolling list of topics.

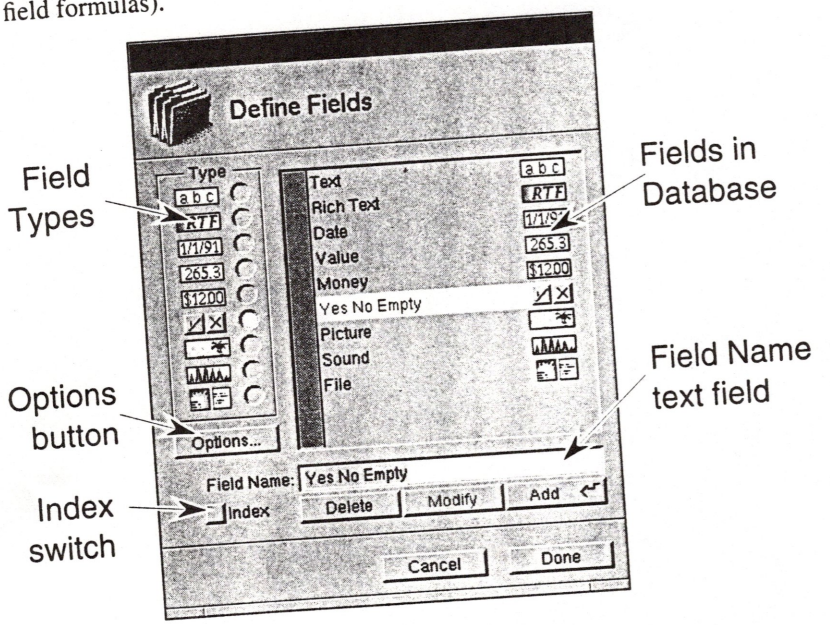
At any time, you can return to the index by clicking on the Index button. You can retrace your path through the help system by clicking on the Go Back button. You can print information on a specific topic by clicking the Print menu item. When you're done with the Help panel, close it by clicking on the panel's Close button.

Basic Concepts

There are several basic things you need to be able to do with any database program. You need to create and modify the database structure by defining the fields, with their types, entry options, and other attributes. You need to design various ways of viewing and formatting your data.You need to

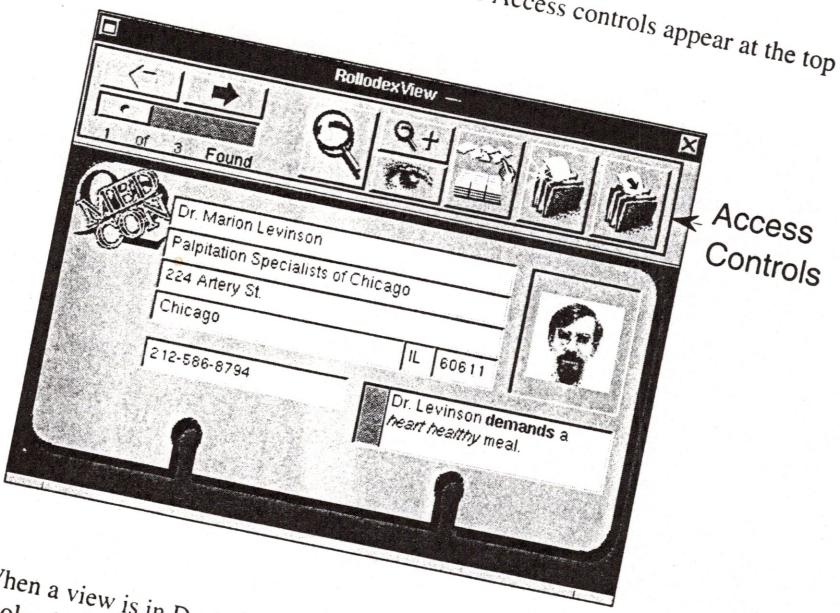
enter data and access the records in your database. You need to be able to find particular records and groups of records and you need to be able to sort those records in different orders.

In **DataPhile**, you use a Define panel to create and modify the structure of your database. In the Define panel, you can add and delete fields and modify their type and characteristics (including entry options and calculated field formulas).

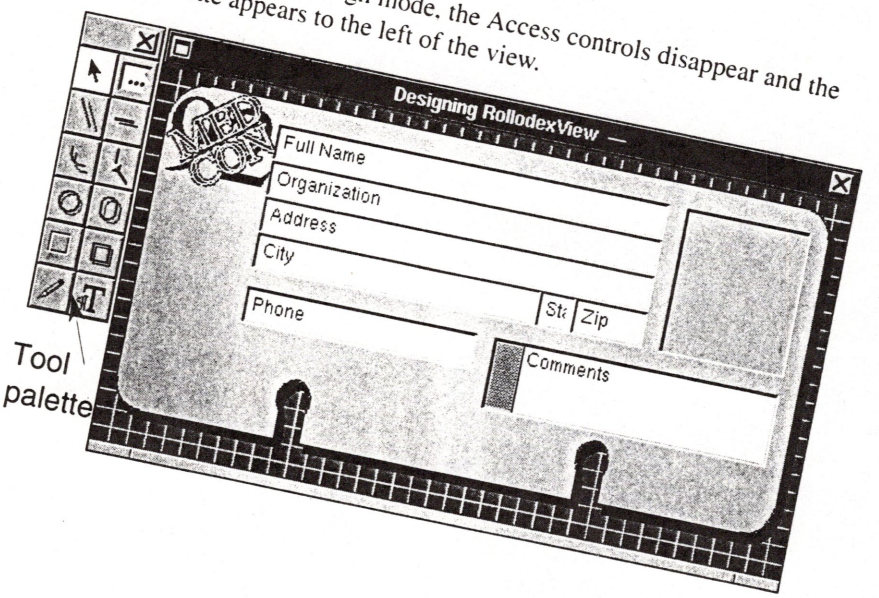


You then use **views** to enter and review your data. You can create as many views and have as many open at one time as you want. When a view is in **Access mode**, you can enter, modify, sort and print records in your database. When a view is in **Design mode**, you can change its appearance by adding and deleting fields and graphics. When a view is in **Find mode**, you can enter search criteria to find specific records in the database.

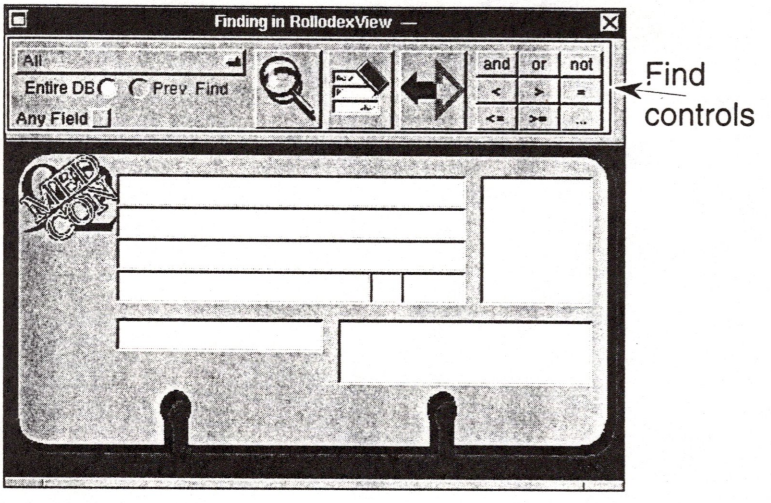
When a view is in Access mode, the Access controls appear at the top of the view:



When a view is in Design mode, the Access controls disappear and the Tool palette appears to the left of the view.



When a view is in Find mode, the Find controls appear at the top of the view:



To put a view into Design mode, choose Enter Design Mode from the Design menu (Command-M). When a view is in Design mode, you can put it into Access mode by choosing Return to Access from the Design menu (Command-M). To enter Find mode from Access mode, choose Find from the Access menu (Command-F). When you are in Find mode and want to return to Access mode, choose Find from the Access menu or click on the magnifying glass button in the Find controls (to execute your Find request) or click on the Cancel button in the Find controls (see labelled controls below).

Creating a Database

You can create a brand new database, you can create a database from a text file, or you can use one of the templates in the Gallery submenu of the Database menu.

To create a brand new database, choose New from the Database menu (Command-N). The Define panel will appear, allowing you to specify the fields, including the field type (click one of the type radio buttons), the entry options (click the Options button) and whether or not the field will be indexed. Indexed fields allow fast finds and sorts but use more disk space. You can specify that a field's value will be calculated based on

other fields by clicking the Options button, choosing Calculated, and then editing the field's formula through the Edit Formula box.

To create a database from a text file, choose Import from the File menu (Command-I). You can specify the appropriate delimiters. **DataPhile** will assume that the first line contains field names; if this isn't the case, you may want to edit the text file to add appropriate field names. Before **DataPhile** begins to import the text file, you can bring up the Define panel to set the field types and other attributes.

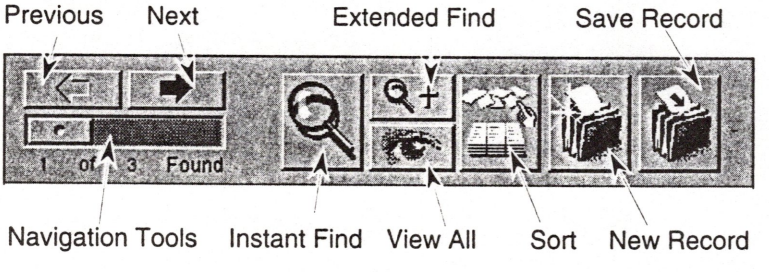
To use one of **DataPhile**'s templates, choose it from the Gallery submenu of the Database menu. You can use it immediately to enter data, or you can call up the Define panel (choose Define from the Database menu) to add or delete fields to customize it for your purposes.

Using the Database/Access Mode

Put a view into Access mode when you want to enter, find, sort or print records. If you have just created a new database from scratch, an import or through one of the templates, the automatically created initial view (View 1) will be in Access mode so that you can immediately begin entering data.

Entering Records

To create a new record, choose New Record (Command-n) from the Access menu or click on the new record icon that appears in the Access



controls in Access mode. Your cursor will automatically appear in the first field. Enter your data, navigating through the fields either by using the Tab key or by clicking in the fields. Pressing the Enter key saves your data, but your data is also automatically saved when you go to another record or

create a new one. For tips on how to automate the data entry process, see Entry Options in Chapter 3.

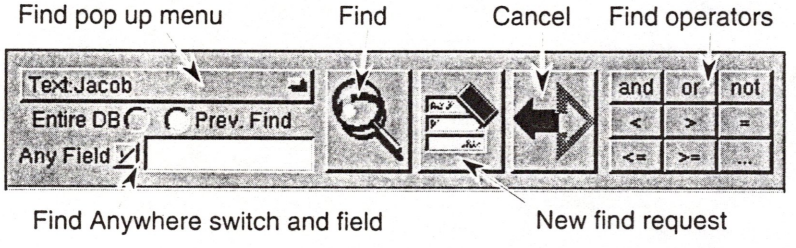
Viewing Data

Click on the Next and Previous arrows or use the scroll bar that appears in the Access controls to view the records in your database.

To view a record from one view in all the open views, choose Find Record In All Views from the Access menu (Command-j).

Finding Records

To find records that meet certain criteria, you need to create a Find request which contains your search specification. Choose Find from the Access menu (Command-f) or click on the magnifying glass in the Access controls to enter Find mode.



Specify the criteria you want to use to select records for the found set. For example, if you have a database with a Name field and you want to find people whose name is Castillo, enter Castillo into the Name field and execute your Find request by pressing Enter, the magnifying glass or Command-f. **DataPhile** will now search for records whose Name field contains words that start with "Castillo". It might find "Peter Castillo", "Castillo, Maria", and "John Castillon".

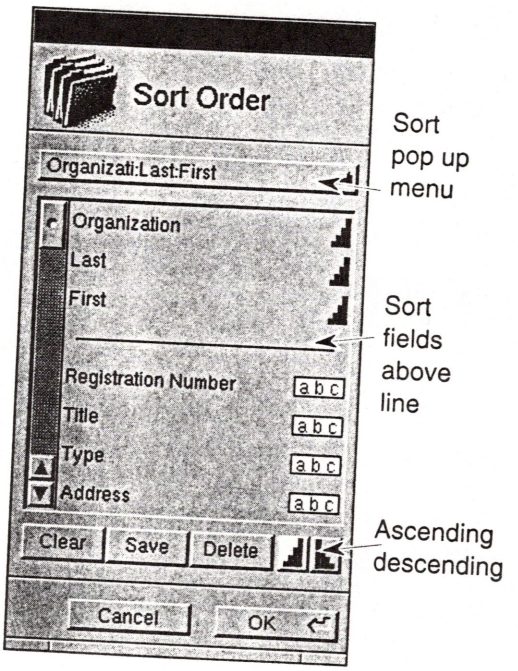
Successful Find requests (requests that find one or more records) and their found sets of records are saved until you quit **DataPhile**. They are available from the Find pop-up menu in the Find controls. You can view these found sets in any view by entering Find mode, choosing the appropriate Find request from the Find pop-up menu and executing the Find request. If you are viewing a found set and want to view all the records, click on the View All button in the Access controls.

DataPhile provides an instant find short-cut for simple Find requests. When a view is in Access mode, select a word in a field and choose Find From Selection from the Access menu (Command-e) or click on the Magnifying glass icon in the Access controls. **DataPhile** will find all records with that word in that field.

DataPhile also supports fairly complex find specifications using logical operators. You can save Find requests to use in your next **DataPhile** session and you can delete Find requests. For more information about finding records, see Chapter 6.

Sorting Records

Records can be sorted (ordered) by any of the fields in the database, including fields that do not appear in the key view. To sort records, choose Sort from the Access menu (Command-O) to bring up the Sort Order panel.



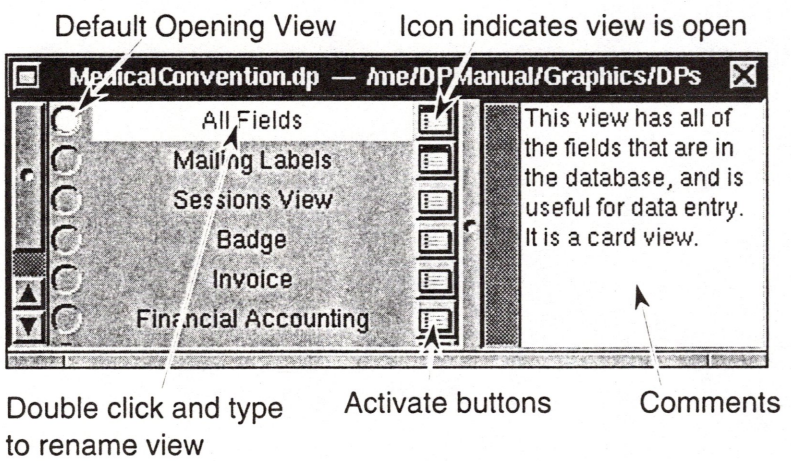
Drag the fields over the line in the order that you want them to be sorted. The sort will be performed based on the order in which the fields appear above the line in the Sort window. You can rearrange this Sort order by

dragging the fields. The Clear moves all the fields below the line (indicating no Sort order).

Any Sort orders that have been executed will appear in the pop-up menu at the top of the Sort Order panel. Like the Find requests, these Sort orders will remain in their pop-up menu during your current **DataPhile** session and you can access them from any view. They can also be saved for use during subsequent **DataPhile** sessions.

Choosing and Naming Views

Any database can have more than one view of its data, and you can have as many of these views open at once as you wish. All views that you create or that already exist in a database appear in the View Browser. The View Browser can be accessed by choosing View Browser (Command-B) from the Tools menu.


Default Opening View
Icon indicates view is open
MedicalConvention.dp — /me/DPManual/Graphics/DPs
All Fields
Mailing Labels
Sessions View
Badge
Invoice
Financial Accounting
This view has all of the fields that are in the database, and is useful for data entry. It is a card view.
Double click and type to rename view
Activate buttons
Comments

To load a view, click on the Activate button to the right of the view that you want to use. The view with the selected radio button is the default view to which the database will open. You can set any of the views to be the default opening view.

You can rename a view at any time by highlighting the name of the view in the View Browser and typing in the desired name.

Designing Views

Put a view into Design mode to modify it for custom viewing and printing of your data. Views can include fields and graphical elements such as boxes, lines, and even EPS and TIFF images so that you can customize your data entry and printing views. To place a view in Design mode, choose Enter Design mode from the Design menu (Command-M).

Creating Views

You can create as many views of your data as you like. To create a new view, choose one of the views in the Create View submenu of the Design menu.

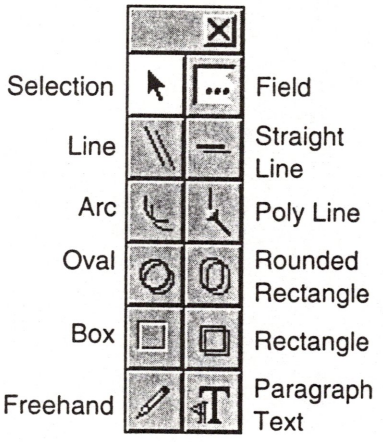
Card and Page views allow you to view and print one record at a time, while Report views give you a scrolling view containing all your records. You can always change a Card or Page view to a Report view or a Report view back to a Card or Page view by choosing Show As Card/Show As Report from the Tools menu (Command-9). For further description of the different types of views, see Chapter 4.

When you create a new view, that view automatically appears in Design mode.

Editing Views

You can edit your views at any time by placing them into Design mode. When your key view is in Design mode, use the Tool palette to add

graphic elements and fields. The Tool palette also contains the Selection tool which you use to select and modify objects in your view



Adding Fields

You can add existing fields to your view at any time. To do this, select the Field tool in the Tool palette and draw a rectangle where you want the field to appear. Then choose the field from the Unused Fields dialog box that appears. You can resize or move the field using the Selection tool.

You can also add fields to a view using the Unused Fields palette. Choose Fields... from the Tools menu (Command-6) and drag a field from the palette onto a view. You can then resize or move the field using the Selection tool.

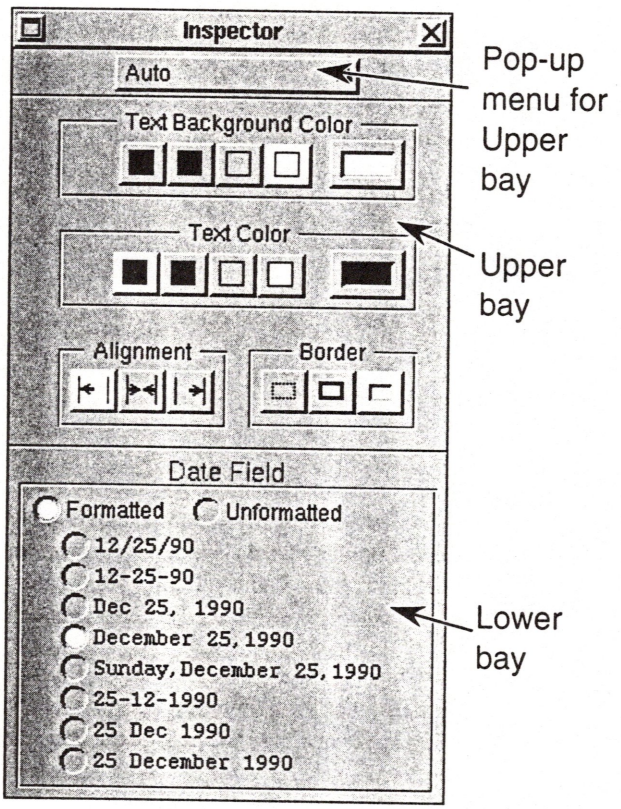
If you want to add a field that doesn't yet exist, first add it to the database using the Define panel, and then add it to your view.

Adding Other Objects

Select a tool from the Tool palette and draw graphic objects. Copy and paste objects from other graphic programs. Drag in TIFF and EPS files from the File Viewer.

Modifying Fields and Graphic Objects

In Design mode, graphic objects and fields have inspectors that allow you to control their graphic characteristics, including location, and format. Inspectors are loaded into the Inspector panel.



To load an object's (or field's) inspector, double click on the object. Or, choose Inspector... from the Tools menu. Each object, including each field type, has an associated inspector (Auto) which controls some of that object's most used characteristics and is loaded into the Inspector panel's bottom bay. Other inspectors can be loaded from the pop-up menu at the top of the Inspector panel.

Advanced layout tools are also available through the Align, Layer & Group, Zoom, Font, and Text submenus of the Design menu. Again, remember that changes apply only to selected objects, including text objects and fields.

Field Formatting

You can control field formatting in Design mode through field inspectors. Each field type has a different inspector. To load a field's inspector, double click on the field. The field inspector will be loaded into the bottom bay of the Inspector panel.

Backing Up Your Databases

It is very important to regularly backup all databases that you use and **DataPhile** makes this very easy. Ideally, you will back up your data every time you close your database.

To back up your data, choose Export All... from the Database menu. This procedure creates a text file in Edit with all your data included, including field names. Set the field and record delimiters. Use the default settings when you are just backing up since they are the same delimiters as the default ones for importing (fields separated by Tabs, records by Returns). Name and locate the text file and press OK. **DataPhile** allows you to then easily recreate your database from the backup text file if necessary. For more information on how to recreate your database from a backup export file, see Chapter 2. For further tips on data security, please see Chapter 10.

Hints for Using DataPhile

General Hints

- If you'd like an overview of all the menus in **DataPhile**, choose Show Menus from the Info menu.

- You can have more than one database open at once. This means that you might have more than one View Browser open at once. Each database view and the View Browser has the path and database name in its title bar.

- If you want all of your fields to be automatically indexed, click on the Index All Fields by Default button in the Preferences panel. If you only want some of your fields indexed, you can click on the Index button in the Define panel for each individual field.

- Use the Import command from the Database menu when you want to create a new database from data contained in a text file. Use the Import Records command from the Database menu when you want to import data contained in a text file into an existing database. In both panels you can set the field and record delimiters; however, in the Import Records panel you also have the option of matching existing data from the text file to the fields in the database into which you are importing.

Design Mode Hints

- If you don't like the change you just made, such as modifications to a view, choose Undo (Command-z) from the Edit menu.

- To select more than one object in a view window or a panel, either drag across the objects with the Selection tool, or add objects to your selection by holding down the Shift key and clicking on the objects.

- Try grouping images when you want to scale a number of images proportionally to other related images. You can also use the Group command before copying images to the Pasteboard for insertion into other types of documents.

- In Design mode, holding down the Control key temporarily chooses the Selection tool if any tool except the Selection tool is highlighted in the Tool palette.

- To resize an object proportionally, hold down the Alternate key while you are resizing it.

- The standard NeXT color well allows you to select a wide range of greys (or colors) for your view objects and backgrounds. To access these color controls, select the object and click on the relevant color well.

- Tab order is set by field location in a view and can be modified by grouping fields in Design mode. The Tab order will be set for each group (from top to bottom in each group).

- A field cannot appear two times in a view. However, you can make a calculated field based on another field to simulate two occurrences of one field in a view.

Access Mode Hints

- If you don't like the change you just made, such as data you entered into a field, choose Undo (Command-z) from the Edit menu.

- If you don't like all the changes you have made to the record since last saving it, choose Revert Record (Command-u) from the Edit menu.

- Alternate-clicking a field which does not have the cursor in it will sort the database on that field. This is especially fast if you have this field indexed.

- Use the Tab key to move through fields in your database, and Shift Tab to move backwards through the fields.

- Choose Show As Card (from the Tools menu) when you want to view one record at a time in a view. Choose Show As Report when you want to view multiple records. Any Report view can be made into a Card view and vice versa using this Show as Card/Report menu command (Command-9).

Chapter 2
Basic Activities

This chapter is intended to be an introduction to how to create, save and perform other routine activities on new databases in **DataPhile**. Many of the concepts presented here are standard NeXT file techniques, but this chapter introduces you to some basic concepts in **DataPhile**. Once you understand these basic concepts, you can look in the other parts of the manual for details about how they operate.

Introduction to Databases, Records and Fields

Like other end-user database systems, **DataPhile** provides you with a structure for organizing data that allows you to find, order and print data quickly. This structure consists of **databases**, **records**, and **fields**. The data that is contained in the database can be arranged into different **views.**

Databases

A database is a collection of information, much like a computerized filing system. In this manual, we may also use the term "file" to refer to the database.

A **DataPhile** database can contain the names, addresses and important information about all your friends or business contacts, inventory of goods for a supply company, information about registration at a conference, a collection of sounds and pictures for use in multimedia presentations, or any other collection of information you need to keep. A database can contain very few records (for example your children's addresses) or very many records (for example the inventory list for an auto parts store). In **DataPhile** the only limit on the size of databases is the amount of disk space you have available.

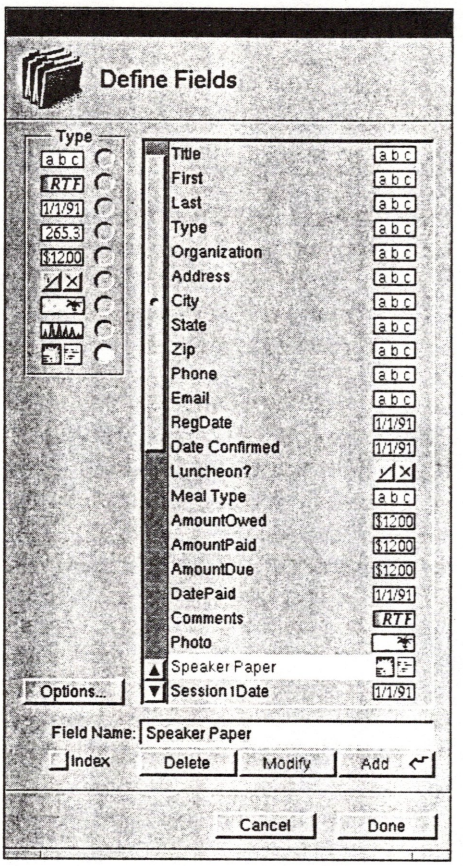
Records

Database files are composed of a number of records. All the information in a database file about one item, person, transaction or unit is called a record. For example, in a database for keeping track of registration at a medical conference, there would be a record for each registrant. Or, in a database for keeping track of inventory at an auto parts store, there would be a record for every part.

A record can also contain all the information you might fill out on a form. Thus, you can think of one record as one form and the database file as being an entire folder of forms. The advantage of using an electronic filing system like **DataPhile** over a manual one is that **DataPhile** allows you to quickly find the records (forms) you need (based on certain search criteria), order them, and print them. It also allows you to take the information from the records (forms) and transfer them to another format such as a spreadsheet, word processing document or another database filing system.

Fields

Each record is made up of fields. Fields are the categories you use to store information. A record in the medical conference database might have the following fields:



Or, in the auto parts store inventory database, there might be records for part name, part number, supplier name, supplier address, city state and zip, the number of this part currently in inventory and the last date that they were reordered.

All fields in a database have an associated field type. For example in **DataPhile**, fields can have a type of Text, RTF, Date, Value, Money, Yes/No/Empty, Picture, Sound, or File. This field type determines what kind of data can be entered into a field and how it is sorted and displayed. For example, in the auto parts store database, the Part Name field would be defined as Text, the Number in Inventory field as Value and the Reorder Date field as Date. Defining the Number in Inventory field as Value, for example, would let you search for the parts you are running low on and need to reorder.

You can have as many fields as you like in a database and can always add and delete fields or change their types. Fields can contain as much or as little information as you wish.

Views

In **DataPhile**, you arrange the fields into Views which you use to enter, view and print the data in your records. Although records contain one of each field, you can create views that display the record with one, a few or all of the available fields included. In other words, the view does not control what data is contained in the records; it merely controls what data is displayed.

DataPhile gives you the option of using one of its preset views or of creating custom ones yourself. You can have as many views as you like associated with any database. For example, in a medical convention database, you could have one view for entering data, one for printing badges, one for printing an attendee's schedule, and another for printing mailing labels.

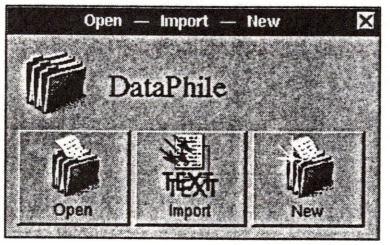
DataPhile provides you with a set of graphic and layout tools for adding graphic elements to the fields in views, making them look just the way you want. You can even paste in graphics from other programs. You also have many options for how the data in the fields in the view are formatted. In this way you can create forms, labels, and reports that look just the way you want.

Creating a New Database

To create a new database from scratch, choose New from the Database menu. This will bring up the Define panel in which you can define the initial structure of the database (see Chapter 3 for more information on how to define fields for your database).

Or, if you have chosen the Open-Import-New panel on launch from the Preferences Panel (see Chapter 9), the following panel will appear when you launch DataPhile:

To create a new database, click on the New button.

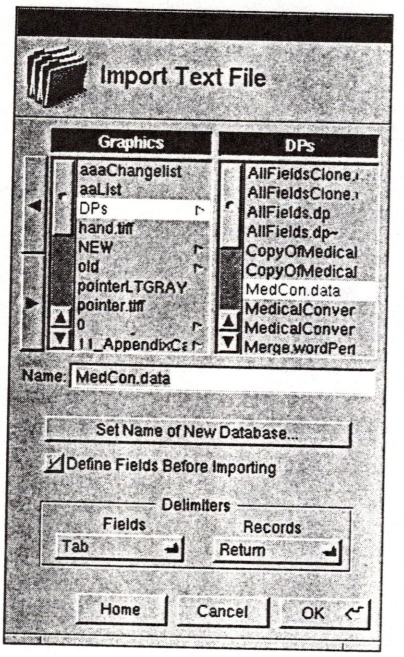


Creating a New Database from an Import File

You can also create a new database from a text file in which the field and record data have been delimited (separated) with consistent characters. As with creating a brand new database, this can be accomplished from the Database menu (Import or Command-I) or from the Open-New-Import panel (see above).

When you choose Import from the Database menu or from the Open-New-Import panel, **DataPhile** displays the Import Text File dialog box which allows you to select a text file for importing, set the name of the new data-

base, set the field and record delimiters, and define the database before importing.



Set Name of New Database...

Click on this button to set the name and path of the database that will be created with the text import. If you do not set the name of the new database, it will be Untitled and stored in the /tmp directory until you name and locate it using the Save As command.

Define Database Before Importing?

When importing a text file to create a new database, **DataPhile** automatically generates a database containing fields named with the contents of the first line of the text file. Several database programs export text with the field names as the first line, including DataPhile, SQL queries, and FileMaker Pro Merge export (FileMaker Pro Tab export does not export the field names). If you want to check your text file, open it in Edit. If the first line doesn't contain field names, you can insert a line containing appropriate field names, using the delimiters used in the rest of the file.

The fields generated by **DataPhile** are text fields. If you want to change the field types, check the Define Database Before Importing checkbox. When you click the OK button in the Import Text File panel, **DataPhile**

will read the first line of the text file, create the text fields, and then display the Define panel. At this point, you can change the attributes of the fields. See Chapter 3 for more information using the Define panel to modify field types and attributes.

When you have finished modifying fields in the Define panel, click OK. **DataPhile** will immediately begin importing the data from the text file.

If you don't check the Define Database Before Importing checkbox, **DataPhile** will automatically create the fields as text fields and will immediately begin importing data.

If your file doesn't contain field names and you don't want to edit your text file to add them, you should create your database first by using the New command from the File menu (see above). Then choose Import Records from the File menu. This command is used to import delimited text into an existing database and is described in Chapter 6.

Delimiters:

Delimiters are the keyboard characters used to separate fields and records in a text file. For example, if the field delimiter is a Tab and the record delimiter is a Return, the information for each field is separated by a Tab and the fields for each record are separated by a Return.

Use the pop-up buttons to tell **DataPhile** what delimiters were used to create the text file you are importing. Many database programs export in "tab-delimited" format in which fields are separated by Tabs and records by Returns. However, if the database that was used to create the text file exports using any other delimiters for its fields and records, you can set these here.

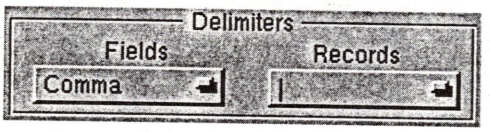
Hint: When trying to import data that has been exported from databases on the Macintosh that use Return as a record delimiter, choose Macintosh from the Record delimiter pop-up menu since the Macintosh uses a non-standard Return character.

If you do not know what field and record delimiters are used in your text file, open the text file in Edit and examine it. Data that you recognize as fields will be separated by a certain character (the field delimiter) and data that you recognize as records will be separated by a different character (the Record delimiter). The field and record data must be separated in a consistent manner for **DataPhile** to be able to import the data.

For example, in the following file, the fields are separated by "," and the records are separated by "|".

```
Name,Title,Company,Address,State,City,Zip,Info|To
m Jones, CEO, Tohachipi Title and Life,138
Westchester St.,Tohachipi,AZ,87603|G. Willickers,
VP of R&D, Designs R Us,3434 East Lansing
Ave,Baltimore, MD, 10873|Jorge
Nevada,President,WhatTheHey Productions,4743 14th
NW,Albuquerque,NM,87107|Billy Bob Samson,Senior
Engineer,Aztec Heating Corp,1919
Broadway,Columbia,MO,78453|Harrison
Chevy,Computer Scientist,Lawrence Livermore Nat'l
Labs,1313 Mips Avenue,Livermore,CA,90876|
```

You can set the field delimiter (a comma) by selecting the comma from the Field Delimiter pop-up menu. However, there is no pop-up menu item for the record delimiter (a "|"). In this case, you can use the Set command at the bottom of the Record delimiter pop-up menu to enter a "|" for the record delimiter.

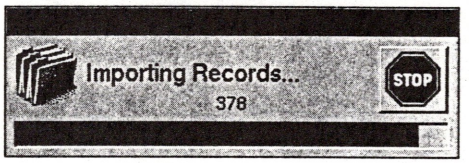


This feature allows you to import from text files that use any single-character field and record delimiters.

Note: When looking at a text file in Edit, be careful not to change any of the punctuation or spacing in the document as that will affect how **DataPhile** recognizes the data as fields and records.

Once all your settings are correct, press OK. If you have checked the Define Database Before Importing checkbox, the Define panel will appear. Otherwise, the following Importing Records panel will show the import in progress. If you press the Stop button, your database will still be created,

but only with the number of records displayed when you pressed the Stop button.

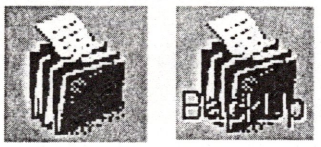


Naming and Saving a Database

When you create a new database from scratch or from an import (and don't name the file first), your database will be named Untitledx.dp and will be stored in the /tmp directory. It will remain there until you save the database or reboot your computer. To name and save the database into the directory of your choice, choose Save As from the Database menu (Command-S). A standard Save dialog box lets you name and locate your database.

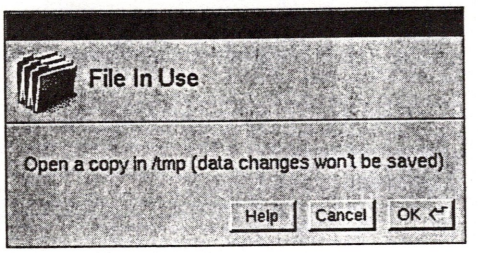
Opening an Existing Database

To open an existing database, you can double click on the database in the File Viewer. (Every **DataPhile** database has two files: the database itself that has a .dp extension and a DataPhile icon and a backup file that has a .dp~ extension and a DataPhile backup icon.)



Or, if **DataPhile** is already running, you can also open a database by choosing Open from the Database menu or the Open-New-Import panel. A standard Open panel will appear allowing you to select the file you want to open.

If you open a database that someone else has already opened, you'll get the following warning panel:

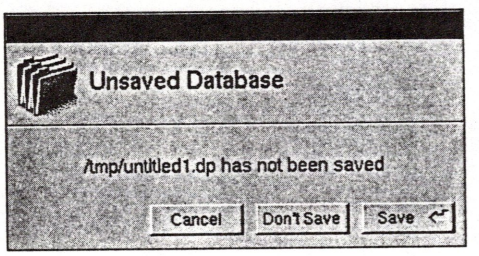


You'll be able to work on a copy of the database, but any changes you make won't affect the original.

Closing a Database

To close a database, choose Close from the Database menu. You can close individual views by clicking on their close boxes, but this closes the view, not the database. If you close all of a database's views and its View Browser, the database will be closed. For more information about views, see Chapter 6.

If you close a newly-created database without first saving it, the following dialog box will appear:



This gives you a chance to name and locate the database.

The Close and Compact command in the Database menu closes the database and then compacts the database file. This is a slow process and should be used only if you have deleted many records or large copied graphics (see Chapter 3 for a description of copied vs. linked graphics).

Saving a Copy of a Database

Once you've saved your database using the Save As command (see above), you can save copies of the database using the Save To command. When you choose Save To from the Database menu, a standard Save panel lets you name and locate the copy of your database. This copy will automatically be opened so that you can begin working on it.

While your database is open, do not use the Workspace's File Viewer to copy the database, as this could result in a corrupted file. Use Save To to save a copy of your database instead. When your database is closed, you can safely copy the database file using standard File Viewer techniques.

Chapter 3
Defining the Database

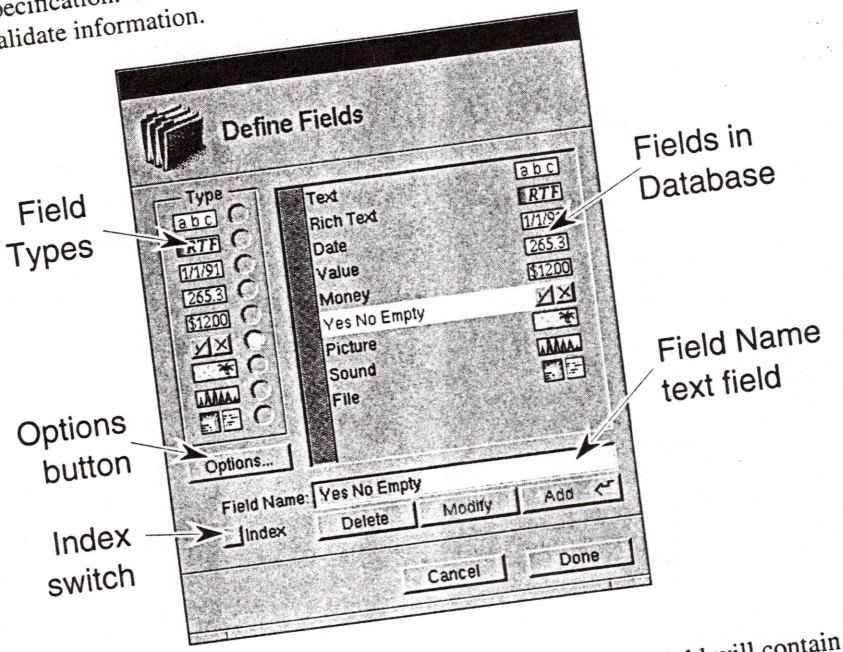
Structure and Field Types

To create a database in **DataPhile**, you must first identify how you want your data organized. You do this by identifying the fields that you want to have and what type of information you will be storing in those fields. This organization scheme is often referred to as the database's structure. Once the structure has been identified, you implement it by defining the fields to be used and giving them field types. If you are not familiar with databases and the concepts and use of fields and records, please see Introduction to Databases, Records and Fields in Chapter 2.

This chapter describes the different field types available in **DataPhile** and describes how to create fields, specify entry options and modify field specifications. For information on entering data, see Chapter 6. For information on displaying and formatting data, see Chapter 5.

To define fields for your database, use the following Define panel. When you create a new database (see Chapter 2), the Define panel automatically appears. Or, you can bring it up at any time by choosing Define from the Database menu (Command-d).

Each field in your database needs a name, a field type, and an indexing specification. You can also give fields entry options to help you enter and validate information.



The field type specifies the type of information that the field will contain and how that information should be handled. For example, with a date field, you can sort records chronologically, find records within a particular time span, and do time related calculations. **DataPhile** provides Text, Formatted Text, Date, Value, Money, Yes/No/Empty, Picture, Sound, and File field types.

The indexing specification allows you to choose whether or not you want a particular field to be indexed. You can find or sort in any field, whether or not it's indexed. Sorting and finding based on indexed fields is much faster, but indices increase the size of your database.

Entry options provide some data entry automation. You can enter a default value or provide a list of values. You can also make sure that the information being entered meets certain criteria.

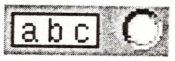
You can add or delete fields and change the field definitions at any time.

Field Types

As you define your database, you need to decide what fields you're going to create. To do this, you need to consider how you're going to use the data. For example, you want to store names and addresses. You could store all the information in one text field, but this would make it impossible to sort by zip code or state or even by last name unless you always entered the names with the last name first. In general, you want to divide your information into the smallest pieces that you are likely to want to find or sort.

Once you've decided on your fields, you specify a field type for each field. The field type determines how the information can be sorted, found, used in calculations, and formatted.

Text Field



A text field can contain any alphanumeric characters. It can contain any amount of text. For example, you would define an address field as Text since it will be used for entry of both text and numbers (1142 High Street).

Text fields are sorted in alphabetic or reverse alphabetic order based on the text at the beginning of the field. If you have numbers at the beginning of a text field, they'll be sorted alphabetically ("1","11","2"), rather than numerically ("1","2","11").

You can find any word in a text field. If you index a text field, each word is indexed.

You can use text fields in calculations using any functions that expect text values.

You cannot mix text fonts and styles in a Text field; to do that you must use an RTF field. However, using a Text field to store text takes up less disk space than using a RTF field, so if you do not need to mix fonts and styles, it is best to define the field as Text (see RTF Field below for more information).

The default formatting for a Text field is non-scrollable. You can control whether a Text field is scrollable or non-scrollable through to Text Field inspector in Design mode (see Chapter 5).

RTF Field

RTF fields can contain mixed fonts and font styles; otherwise, they behave like Text fields. RTF fields take up more disk space than Text fields because the formatting information must be stored.

The default formatting for this field is scrolling. You can control whether an RTF field is scrollable or non-scrollable through the RTF Field inspector in Design mode (see Chapter 5).

Date Field

A Date field can contain a single date. A date consists of a month, a day, and a year.

Date fields are sorted chronologically from earliest to latest or from latest to earliest.

You can find a particular date or a range of dates. You can't use a Date field to find "January", because January is not a date, although you could use a range to find every date in January 1992.

You must enter a complete date. If you want to store just the year or the month and day without the year, you should probably use a value or a text field. However, in **DataPhile**, you can enter just a year or a month and a day into a Date field; **DataPhile** will use a default value for the missing information (see Chapter 6 for more information on data entry.)

You can use Date fields in calculations. For example, you can calculate another date by adding a value to a date. You can calculate the number of days between two dates by subtracting one date from another.

Dates can be formatted in several different ways, including European formats. Date field formatting is controlled with the Date Field inspector in Design mode (see Chapter 5).

Value Field

You can enter numbers and text into a Value field. For example, you could enter "12", "12.0", or "12 apples".

Value fields are sorted in ascending or descending numeric order based on whatever number value is in the field.

You can find a number or range of numbers. If you index a Value field, only the numbers are indexed.

You can use Value fields in calculations where a numeric value is expected.

You can format a Value field by specifying the number of digits to appear to the right of the decimal point. If you format a Value field, any text that you entered with the value will not be visible. Value field formatting is controlled with the Value Field inspector in Design mode (see Chapter 5).

Money

Money fields and Value fields are very similar, but **DataPhile** handles money values differently to avoid round-off and floating point errors.

You can format a Money field in a number of ways, including using a variety of international currency symbols. Money field formatting is controlled with the Money Field inspector in Design mode (see Chapter 5).

Yes/No/Empty

Use a Yes/No/Empty field when you want to indicate a yes/true or no/false value. A Yes/No/Empty field can have a yes or no value or be empty.

You can sort and find on Boolean fields. The sort order is Yes, No, Empty.

Use Boolean fields in calculations when you need a true or false value, as in the If function.

You can format a Yes/No/Empty field as either a checkbox or a text field. Yes/No/Empty field formatting is controlled with the Yes/No/Empty Field inspector in Design mode (see Chapter 5).

Picture and Sound

Picture fields can contain an EPS, TIFF, Adobe Illustrator or TextArt image, or a Create image or document.

Sound fields can contain sounds in either .snd or .vox format.

A Picture or Sound field can contain either a link to a file containing one of **DataPhile**'s supported types or it can contain a copy of the picture or sound. If it contains a link, the file is read in every time you access the record. If the field contains a copy, the picture or sound is stored in your **DataPhile** document.

You control whether Picture and Sound fields are linked or copied through the Options... button. The default setting for both Picture and Sound fields is linked, but you can change the default setting in the Preferences panel (see Chapter 9).

For information on how to enter images into and use linked and copied Picture fields in **DataPhile**, see Chapter 6.

Use a linked field when

- You are trying to minimize your disk space usage. With a linked file, the picture or sound is stored only once.

- Your picture or sound may be modified and you want your **DataPhile** record to access the most recent version. With a linked field, any changes made and saved to the original picture or sound will be reflected the next time the record is displayed.

Use a copied field when

- You don't want the picture or sound to change if the original file is modified.

- You want to transfer the database to a location that doesn't have access to the original files.

- You want to paste images or sounds in the field.

You can change a field from a linked to a copied field in the Define panel at any time, but if you do this after you have entered a lot of pictures, it may take a long time because **DataPhile** will immediately copy all the data in the linked files. This option is particularly useful if you want to send your database to someone else and want the graphics or sounds that were previously linked to be included in the database you send.

If you change a field from copied to linked, new pictures and sounds will be linked, but pictures and sounds already in the database will remain stored in the **DataPhile** document.

You can sort and find on Picture and Sound fields, but if you'll need to find records based on the contents of those fields, you may find it more useful to create an additional field to identify the contents. Linked fields are sorted based on the complete path name of the linked file. Copied fields are sorted based on the name of the file but not on the complete path. A copied field containing a pasted picture or sound is sorted based on an arbitrary identification string.

You can use Picture and Sound fields in some calculations. For example, you can use the Filename function to get the complete path of a linked field or the file name of a copied field.

You can copy a picture or sound from a Picture or Sound field to use in another application.

File

You can store links to documents, applications, and directories in File fields. For example, you could develop a database of your word processing documents, using text fields to record key words and descriptions, and a File field to reference the document itself. When you click on the File field in Access mode, the document and its owner application will be launched.

If an application is contained in a File field, clicking the field will launch the application. If the field contains a document, clicking the field will launch the application and request that the application open the document. If the file field contains a directory, the Workspace Manager will be made the key application and the directory will be displayed in a separate folder window.

Sorting and finding work the same as sorting and finding on linked Picture and Sound fields. Sorts are based on the complete path name of the document referenced in the File field.

For information on how to enter documents, applications or directories into the File field, see Chapter 6.

Defining Fields

If you are already familiar with end user databases, you may only need to read the Short Instructions below to get started defining fields. If the Short Instructions do not provide sufficient information, please refer to the Long Instructions.

Short Instructions

1. If the Define panel isn't active, bring it up by choosing Define from the Database menu (Command-d).

2. Enter a field name into the Field Name text entry box.

3. Check the Index box if you want the field to be automatically indexed.

4. Assign a field type by clicking on a Type button or by using the up and down arrow keys to select one.

5. Click on the Add Field button or press Return to add the field to the database.

6. Once the field is added, select the field and then click on the Options... button to view the various entry options associated with each field type. Choose your entry options and press OK to return to the Define panel.

7. When you are through adding fields, click on the Done button to save the field additions. If you are creating a new database, all the fields you have just defined will appear in a default view.

   This default view displays all of the fields initially defined for the database in a vertical arrangement. It is also by default a Card view which means that only one record will be displayed at a time. For more information on the other types of views that are available to you, see Chapter 4.

Long Instructions

1. If you are creating a new database, the Define panel will be active. However, if you are working with a database that has already been created, you may need to bring up the Define panel by choosing Define from the Database menu (Command-d).

2. **Name the Field:** Type the name of the field into the Field Name text entry box. The field name can include numbers, characters and spaces and be as long as you like. If the field name is longer than the Field Name text entry box, the name will continue on the next line.

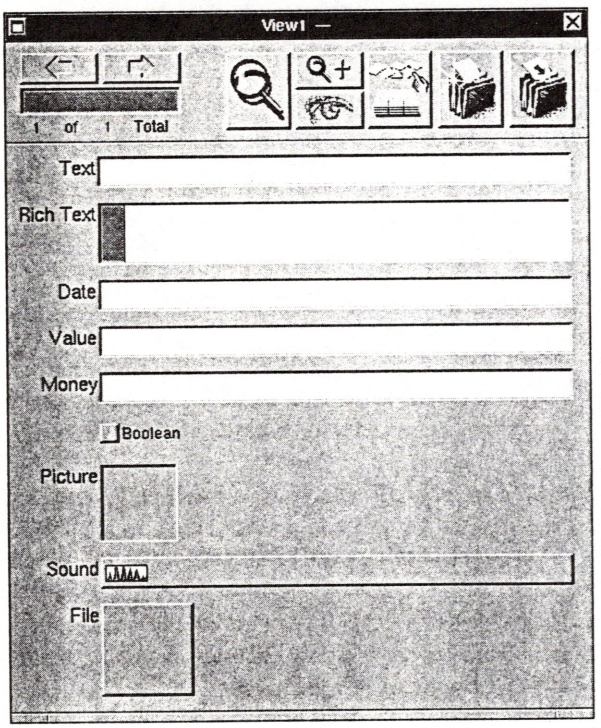
3. **Index:** When the Index box is checked, an index will automatically be created for the selected field. Finds and sorts take less time with an indexed field, but indexed fields use more disk space. So, if you plan to execute a Find request frequently using a particular field, then check the Index button in the Define panel when that field is selected. If you plan to execute a Find or Sort request only occasionally on a particular field, then you can leave the Index box unchecked.

4. **Assign a Field Type:** Click on a Type button or use the up and down arrow keys to select one. See Field Types above for more information on how to choose what field type to apply.

5. **Add the Field:** After you have set the type and indexing, click on the Add Field button or press Return to add the field to the database.

6. **Choose Entry Options:** Once you've added a field to the database, you can set various entry options. Select the field by clicking on it and then click on the Options button in the Define panel. The various options associated with each field are described in detail below in Entry Options under each field type.

7. **Save the Field Additions:** When you are through adding fields, click on the Done button to save the field additions. If you are creating a new database, all the fields you have just defined will appear in a default view. If you press Cancel, none of the changes you have made in the Define panel will take effect.



This default view displays all of the fields initially defined for the database in a vertical arrangement. It is also by default a Card view which means that only one record will be displayed at a time. This automatically-created view will initially be in Access mode. If you want to modify it, place it in Design mode. You can also create additional views. For information on the other types of views that are available to you, see Chapter 4. For information on how to modify views in Design mode, see Chapter 5.

Modifying the Database Definition

At any point in your use of **DataPhile**, you can return to the Define panel to add or delete fields or modify existing ones. The Define panel can be accessed from Design or Access mode at any time by choosing Define from the Database menu.

Adding Fields to a Database

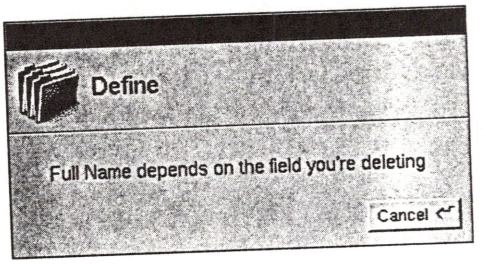
To add new fields, bring up the Define panel. Add fields as described above. When you're finished adding fields, be sure to press Done to save your changes and exit from the Define panel. If you press Cancel, you will exit from the Define panel without saving your changes.

New fields that you create after the initial field definition will not automatically be placed into any views. If you want them to appear in a view, place the view in Design mode and add them (see Adding Fields to a View in Chapter 5).

Removing Fields from a Database

To remove existing fields from a database, bring up the Define panel (Define from the Database menu or Command-d), select the field and press Delete. Any data stored in a deleted field will be lost and the deleted field will removed from all views in which it appears.

If you have defined a calculated field formula that depends, either directly or indirectly, on the field you're deleting, **DataPhile** will display a dialog box:



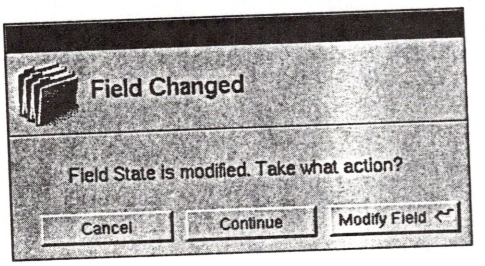
You'll need to edit calculated field formulas to remove any dependencies before you can delete a field.

Modifying Existing Field Definitions

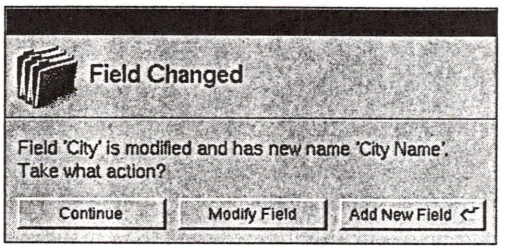
To modify an existing field definition, including its name, bring up the Define panel. Select the field whose definition you want to modify and make the desired changes.

The field name, type, and indexing can be changed directly on the Define panel. When you change one of those attributes, the Modify button will be enabled and the Options button will be disabled. Click on the Modify button to confirm the changes you have made.

If you have modified the field name, type, or indexing and attempt to select another field without first pressing the Modify button, you will be warned that you have made a change and you'll be given various options. If you have changed the type or the indexing, you'll be able to modify the field, continue editing without modifying (thereby losing your modifications to that field) or cancelling your action so that you can continue modifying the original field.



If you change a field's name, you'll be able to confirm the modification, add a new field with the new name, or continue editing without modifying (thereby cancelling your name change).



To change any entry options, select the field you want to modify. Click on the Options button and make whatever changes you want in the Options panel. When you click OK in the Options panel, you confirm your modifications to that field.

A dot appears next to fields that have been modified

When you're done modifying fields, press the Done button in the Define panel to confirm all of your changes. If you don't want any of your changes to take effect, press the Cancel button.

Rearranging Fields in the Define Panel

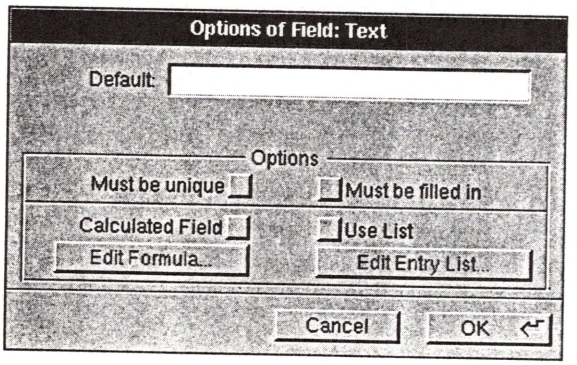
You can rearrange the fields in the Define panel by dragging them to a new position. Any rearrangement of the field order in the Define panel will affect the field order in views created with all fields, in the Unused Fields palette and in the Unused Fields dialog box that appears when you draw a field in a view in Design mode (see Chapter 5).

Entry Options

Each field type has various entry options associated with it that allow you to automate or control the data entry process. Although some of the entry options work the same for many different types of fields, some are specific

to certain field types. Below we describe all the entry options under their appropriate field types. However, since many of the options overlap, we may refer you to previously described field type options.

Text Field Options



The options described below are the same for the Text, Date, Value, and Money fields. Some of the options also are applied to the RTF, Boolean and File fields. These options are described once below in a general fashion. Specifics that apply to a specific field type will also be explained under the corresponding field type.

Default:

Use this text entry field to enter a string that you want to be automatically entered into every new record. This default will apply to all new records created after a default setting is saved. It does not apply to existing records and it can also be overridden during the data entry process. Using default entries can help speed up the data entry process.

You can use the default value to enter a serial value. Serial values increment automatically as new records are entered. To use a serial value, enter your starting value and add a "+" character. For example, "1+" will start at 1 and increment by 1 for each new record. If you want to increment by a number other than 1, enter it after the "+". For example, "1+10" will start at 1 and increment by 10, giving you the series 1, 11, 21,etc. You can also use alphanumeric starting values. For example, "AAA 000+" will generate "AAA 000, AAA 001, ...AAA 999, AAB 000...".

The Default text entry box can also be used to automatically enter the current date. To have the current date entered as a default into a Date field, type "today" into that field's Default text entry box.

Must Be Unique:

When this button is checked, every value that you enter will be checked to make sure that it doesn't already occur in that field in another record. **DataPhile** checks for an exact match; "John Jones" and "Jones, John" are not considered to be duplicates.

Must Be Filled In:

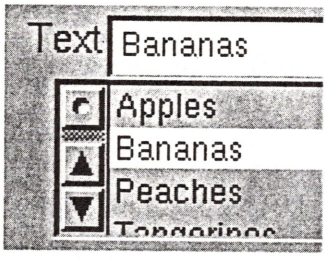
If this button is checked, **DataPhile** will warn the user if the field is left blank.

Calculated Field:

Click on this button when you want the field to be the result of a calculation using the values of other fields in the same record. See Calculated Fields below for a more complete description of this option.

Use List:

Check on this box when you want **DataPhile** to display a pop-up list of possible values for the field during data entry so you can select a value instead of typing it in.



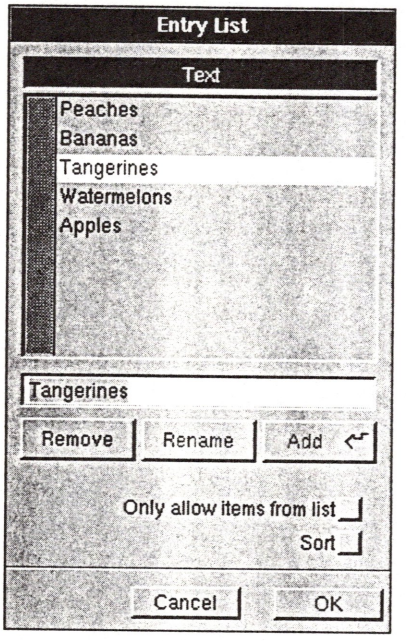
For example, in the above database, the **Text** field uses a pop-up entry list whose options include Apples, Bananas, Peaches and Tangerines.

There are a couple of reasons for using pop-up entry lists. First, if you regularly use one or more strings in a field, a data entry person need only select the desired one from a list. This can save time, especially when the entries are long. Pop-up lists also help to improve data entry accuracy since the data entry person does not need to worry about accurately spelling the entries. Also, pop-up lists allow data entry to be more consistent.

In addition, you can require that entries be made only from the values on the list or you can allow entries that aren't on the list.

Edit Entry List:

This button brings up a panel which allows you to create and edit the pop-up list.



To **add** items to the list, type the item into the text entry field and click on the Add button.

To **remove** items from the list, highlight a previously added item and click on the Remove button.

To **change** items in the list, highlight the item, modify the text in the text entry field and click on the Rename button.

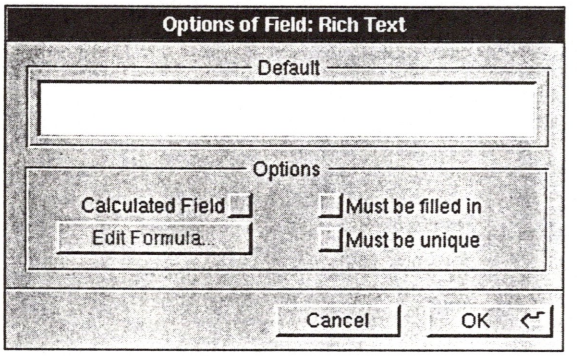
Only Allow Items From List:

When this button is checked, **DataPhile** will warn you if you try to enter a value that's not on the pop-up entry list.

Sort:

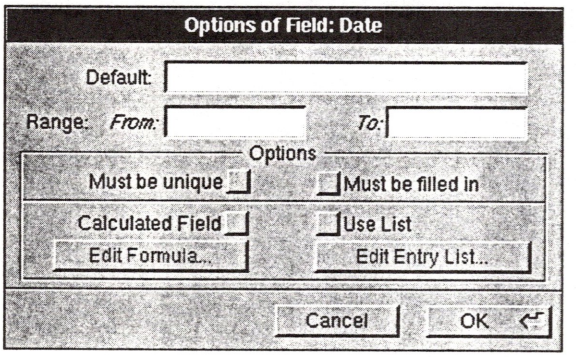
Click on the Sort button to sort the items on the list in ascending order. Text will be sorted before numbers.

RTF Field Options



For an explanation of the Options available for RTF fields, see the description of the same features under Text Field Options above.

Date Field Options



For an explanation of the options available for Date fields, see the description of the same options under Text Field Options above. The following entry option applies to Date, Value and Money fields.

Range:

If you want a value entered into a field to fall within a chronological or numerical range of values, you can specify a range in the Range text entry fields. For example, all dates entered into a Date field with 5/1/91 in the From text entry field and 10/1/91 in the To text entry field must be between 5/1/91 and 10/1/91. The range is inclusive; both 5/1/91 and 10/1/91 and all dates in between will be accepted. If you do not enter a year into the dates in the Range boxes, **DataPhile** will automatically assign the current year to the date.

If you enter a date in the "From" box only, **DataPhile** will only accept dates that are on or after that date into the Date field.

If you enter a date into the "To" box, **DataPhile** will only accept dates that are on or before that date into the Date field.

If you enter a value that's not in the range, **DataPhile** will allow you to enter the value after warning you that it is not in the range.

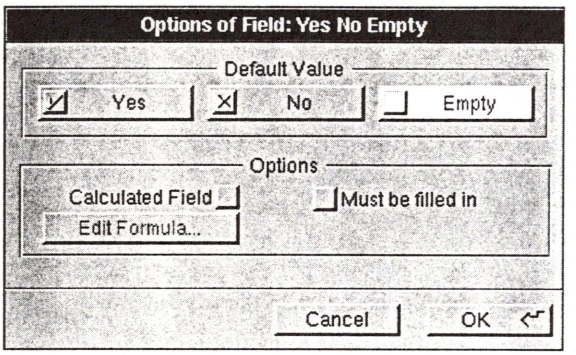
Value Field Options

For an explanation of the options available for Value fields (except Range), see the description of the same options under Text Field Options above. The Range option is described under Date Field Options above.

Money Field Options

For an explanation of the options available for Money fields (except Range), see the description of the same options under Text Field Options above. The Range option is described under Date Field Options above.

Yes/No/Empty Field Options

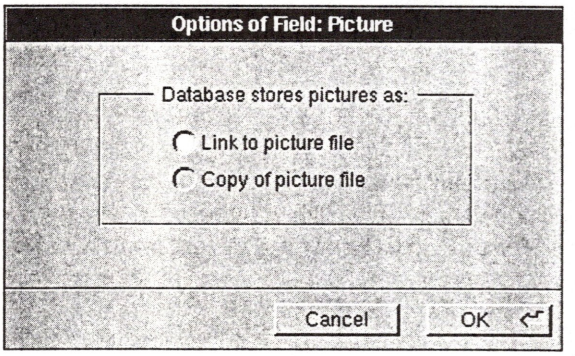


For an explanation of the options available for Yes/No/Empty fields, see the description of the same options under the Text field description above. Below are descriptions of features that specifically apply to the Yes/No/ Empty field type.

Default Value:

A Yes/No/Empty field always has a value. It is either yes/true, no/false or blank/empty. Use these buttons to set a default value.

Picture and Sound Options:



DataPhile can store the pictures and sounds as a link to a picture or sound file or as a copy of a picture or sound file. The default setting is link, but you can change that in the field's Options panel. For information on when

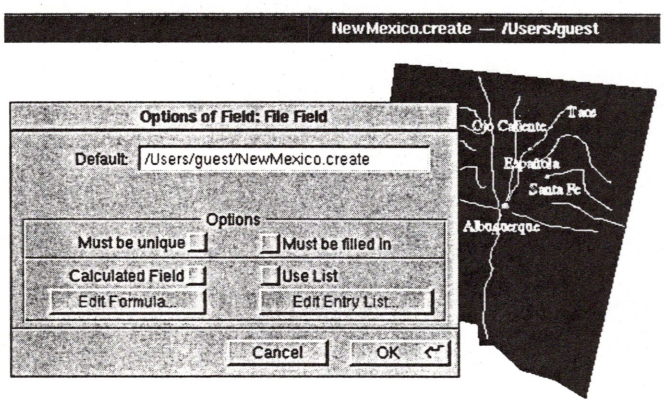
to use linked or copied Picture and Sound fields, see the Picture and Sound Field definitions above.

File Field Options:

For an explanation of the options available for File fields, see the description of the same options under Text Field Options above. Below are descriptions of features that specifically apply to the File field type.

Default:

Default file entries must include the full path name of the file.



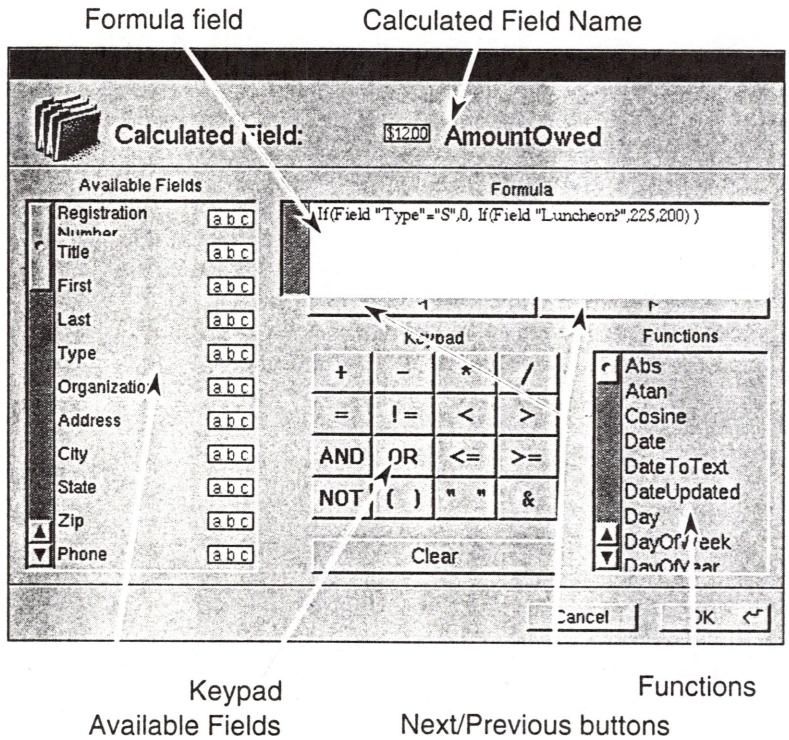
Calculated Fields

Define a field as a Calculated field when you want the data in that field to be the result of a calculation involving other fields in the database. Text, RTF, Date, Value, Money, Yes/No/Empty and File fields can all contain calculated values.

For example, if you have a database for invoicing your customers and you want **DataPhile** automatically to calculate the sales tax, you would create a Money field called Sales Tax and define it as a Calculated field. The formula that makes up the sales tax field would be the sales total multiplied by your local sales tax rate. You cannot enter another value or other data into Calculated fields when you are in Access mode. Only the calculated

data will appear. Any data in previous records will be changed to reflect the calculation.

To create a Calculated field, select the field in the Define panel, click on the Options button to open the Options panel and click on the Calculated field checkbox. Then, click on the Edit Formula button to bring up the following Calculated Field panel.



The name of the field for which you are defining the calculation will appear in the Calculated field name box. A calculation can involve any of the fields showing in the Other Fields list, the operators in the Keypad and any of the available functions.

Create the formula by clicking on the field names, Keypad operators and Functions. You can also type the formula directly into the formula box.

All the Keypad operators and Calculated Field Functions are described in Appendix A.

Hints for working with Calculated Fields:

- The Formula, Other Fields and Functions boxes are all scrolling. If you don't see what you are looking for, use the scroll bar to see more of the contents.

- **DataPhile** uses standard precedence (mathematical order) rules: in a formula without any parentheses, exponentiation is calculated first, then multiplication and division and then addition and subtraction. You can override these rules with the use of parentheses.

- You can erase an entire formula by clicking on the Clear button.

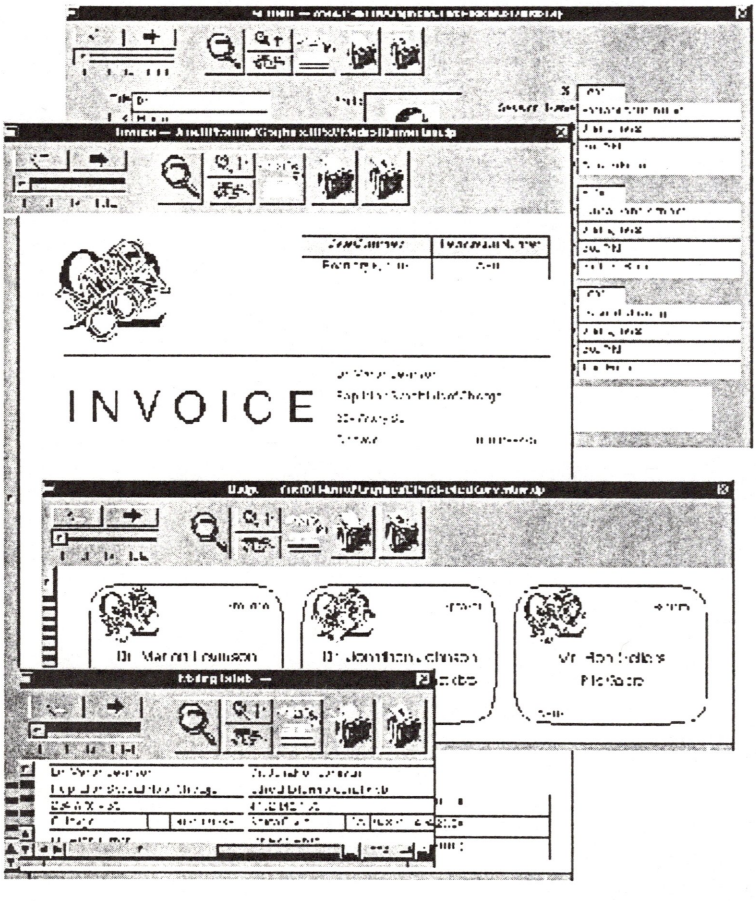
When you are satisfied with your formula, press the OK button. **DataPhile** will check your formula for syntax errors and make sure that the result of the formula is consistent with the field type of the calculated field.

For more information on the Calculated fields and a detailed description of the Functions and error messages, see Appendix A.

Chapter 4
Use of Views

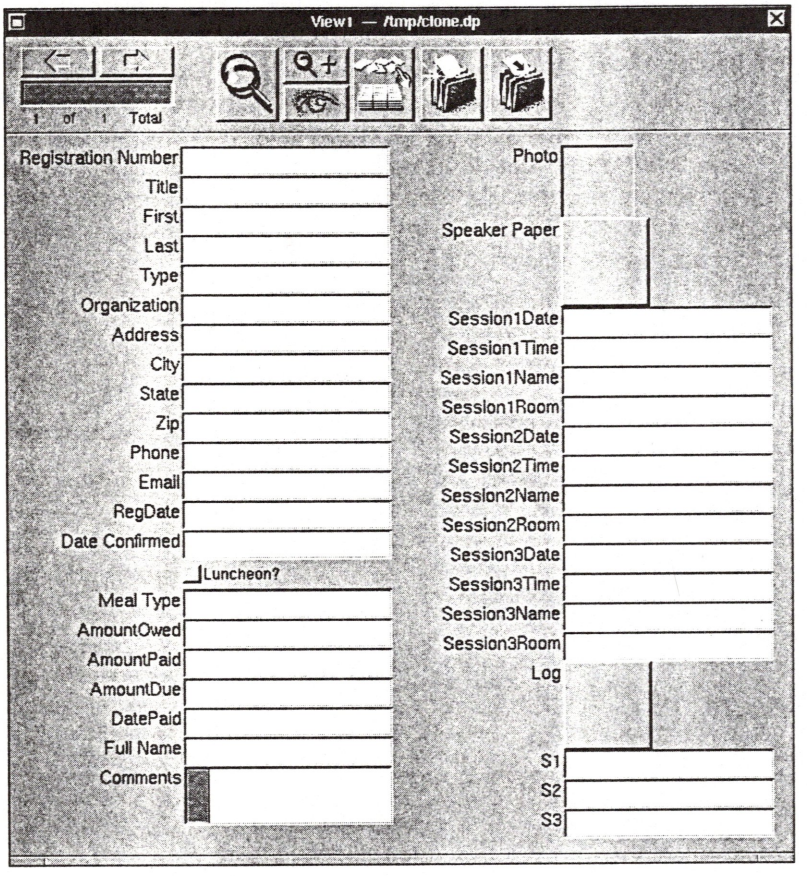
Overview of Views

DataPhile provides you with unprecedented ability to create interesting and useful views for entering data and generating great-looking reports. In **DataPhile**, a view is a specific arrangement of fields and graphic objects. You'll use views to create custom layouts for entering, displaying, and printing your data. For example, in the medical conference database, you may have a view for entering data, for invoicing participants, for printing mailing labels and for making badges.



Views can contain some or all of your fields and they can format the data in different ways. You can have as many views as you want and you can have as many open at once as you want.

When you create a new database, **DataPhile** automatically creates a view which contains all of the fields you defined. You can use this view to start



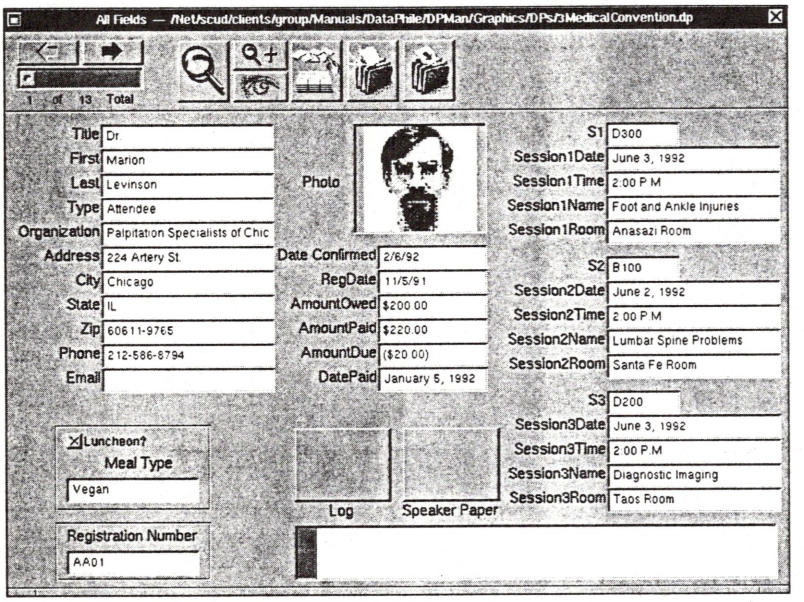
entering data immediately. You can also modify this view (see Chapter 5) or create custom views (see below).

This chapter explains the types of views provided by **DataPhile** and describes how to create views. It also covers adding headers and footers to your views and how to select, clone, and delete views. Chapter 5 covers designing views: how to add, delete, edit, and manipulate fields and graphics to create attractive forms and reports. Chapter 6 describes how to use the View Browser to name and load your various views.

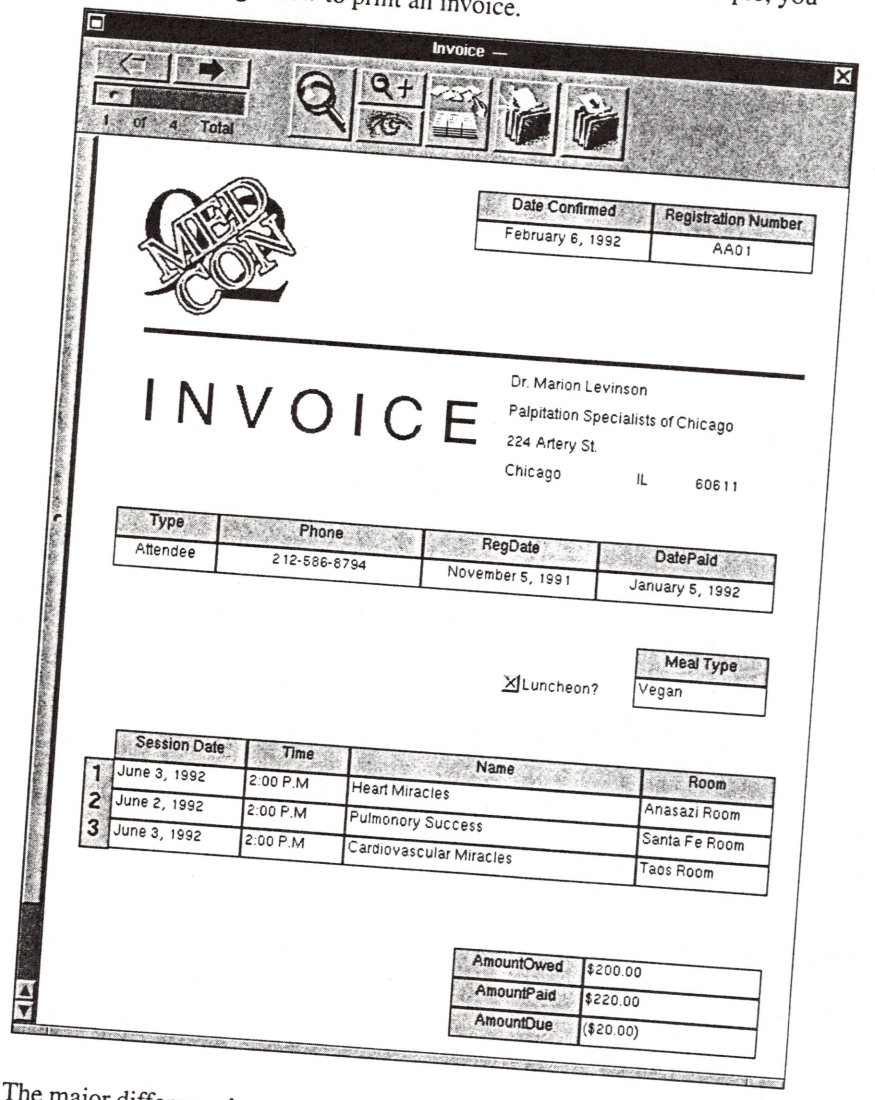
View Types

DataPhile provides three types of views: Card, Page, and Report. (**DataPhile** also provides some special purpose report generators for printing envelopes and mailing labels, but these are handled differently and are described in Chapter 7.) In Card and Page views, you view and print one record at a time. In Report views, you view and print multiple records.

Card views are most useful for entering data and viewing data on the screen.

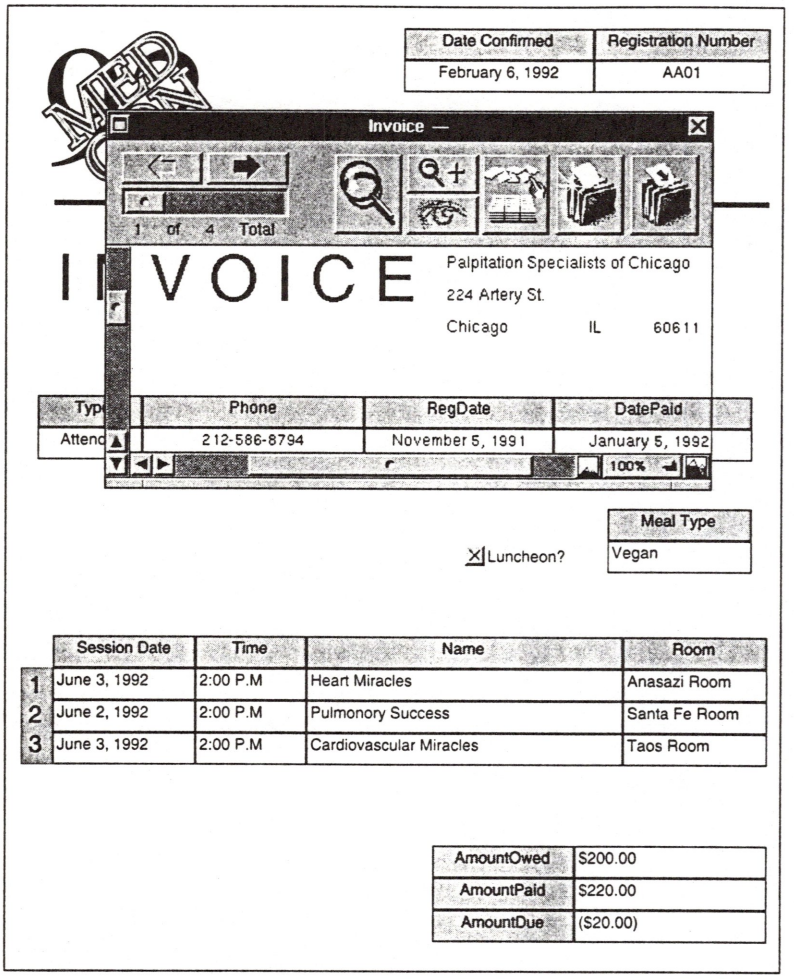


Page views are excellent for printing single records; for example, you might use a Page view to print an invoice.



The major difference between Card and Page views is the view sizing. The size of a Page view is designed to correspond to a printed page and is set in the Page Layout panel. When you resize the window on a Page view, you

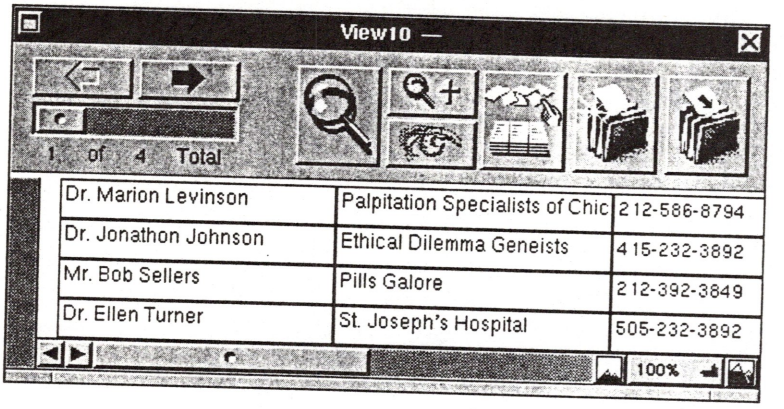
are not changing the size of the view itself, but only the size of the visible area of the view.



The size of a Card view, on the other hand, depends on its contents and on the window size. You set the Card view's size using the window's resize bar when you're in Design mode, but you are constrained to a set minimum vertically and to the right edge of the rightmost field horizontally.

You can set the size of a Card view using the Page Layout panel, but this will automatically convert your Card view to a Page view.

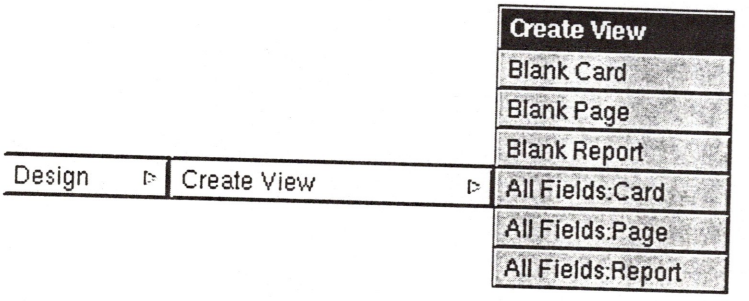
Use a Report view when you want to view multiple records at one time or print more than one record on a page. For instance, you could use a report view to print a phone list.



The horizontal size of a Report view is determined by the width setting in the Page Layout panel. The vertical size is determined by the number of records displayed in the view.

Creating Views

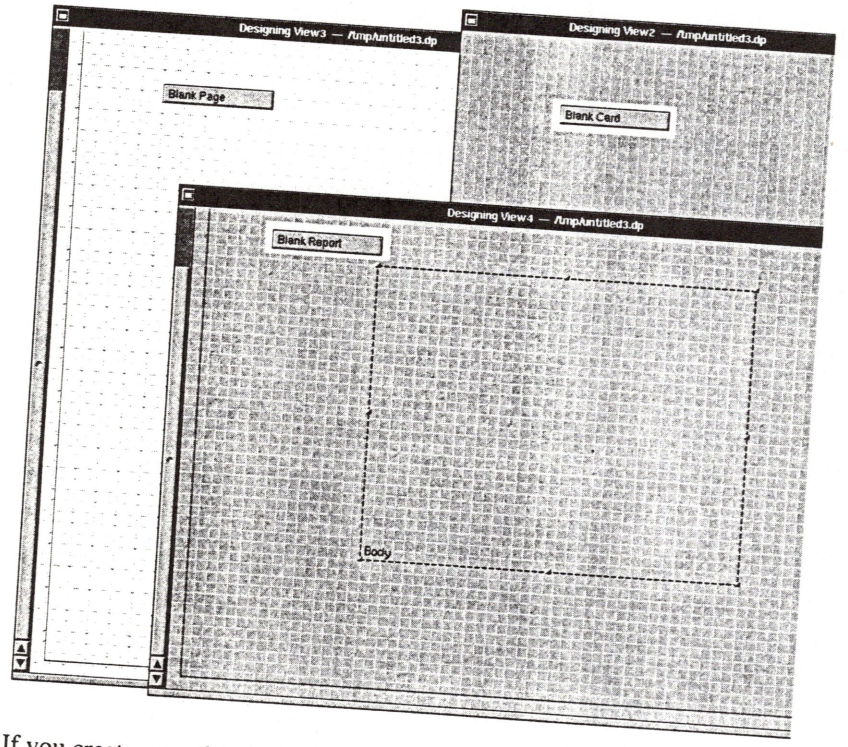
Create new views with the Create View submenu of the Design menu. You can create a new Card, Page or Report view either with no fields or with all of the fields you've defined for your database. You can also create a new Report view with all fields by choosing New Report View from the Reports menu.



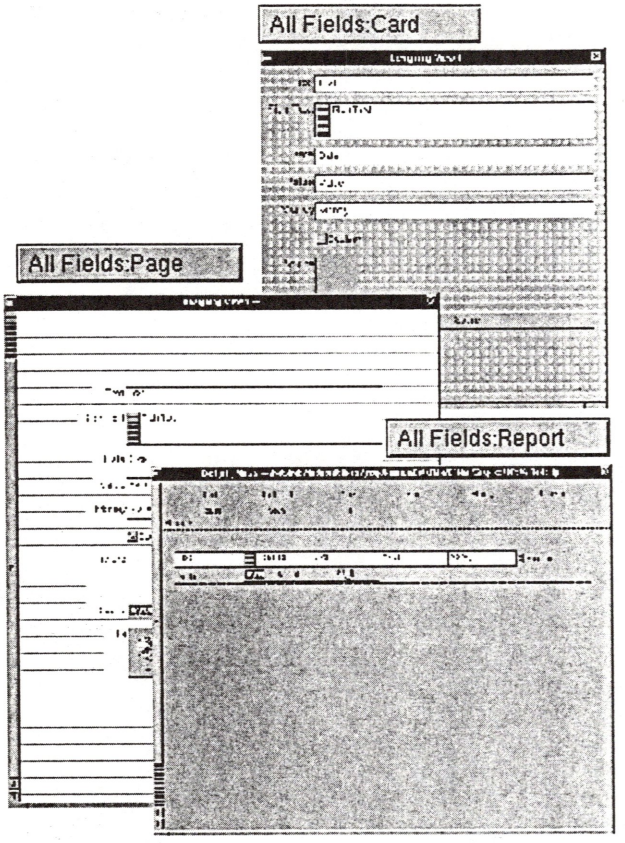
Your newly created view will automatically be placed in Design mode so you can edit it. If your view contains all fields, you can go to Access mode

and immediately begin entering or viewing your data. However, you'll probably want to arrange and format fields and add graphics to your view. See Chapter 5 for information on editing the contents of your view.

The following view templates are available through the Create View submenu of the design menu.



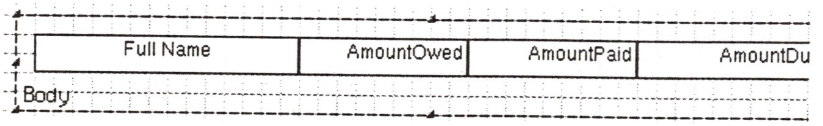
If you create one of these new blank views, you will need to add fields to your view. See Adding Fields to a View in Chapter 5 for instructions on how to add fields to a view.



If you create one of these views with all the fields included, you may want to delete or rearrange some of your fields. Please see Chapter 5 for instructions on how to delete and rearrange fields in a view. If you want to rearrange fields in a Report view, see View Parts below for special instructions on selecting fields in a Report view.

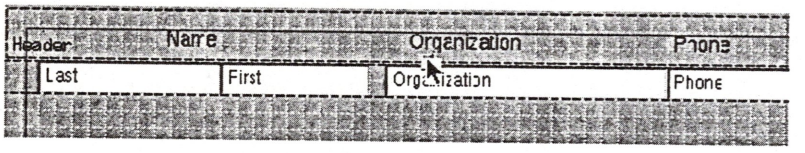
View Parts

All views can have headers and footers. Report views also have a body that allows you to control the size and positioning of each record in the Report view.



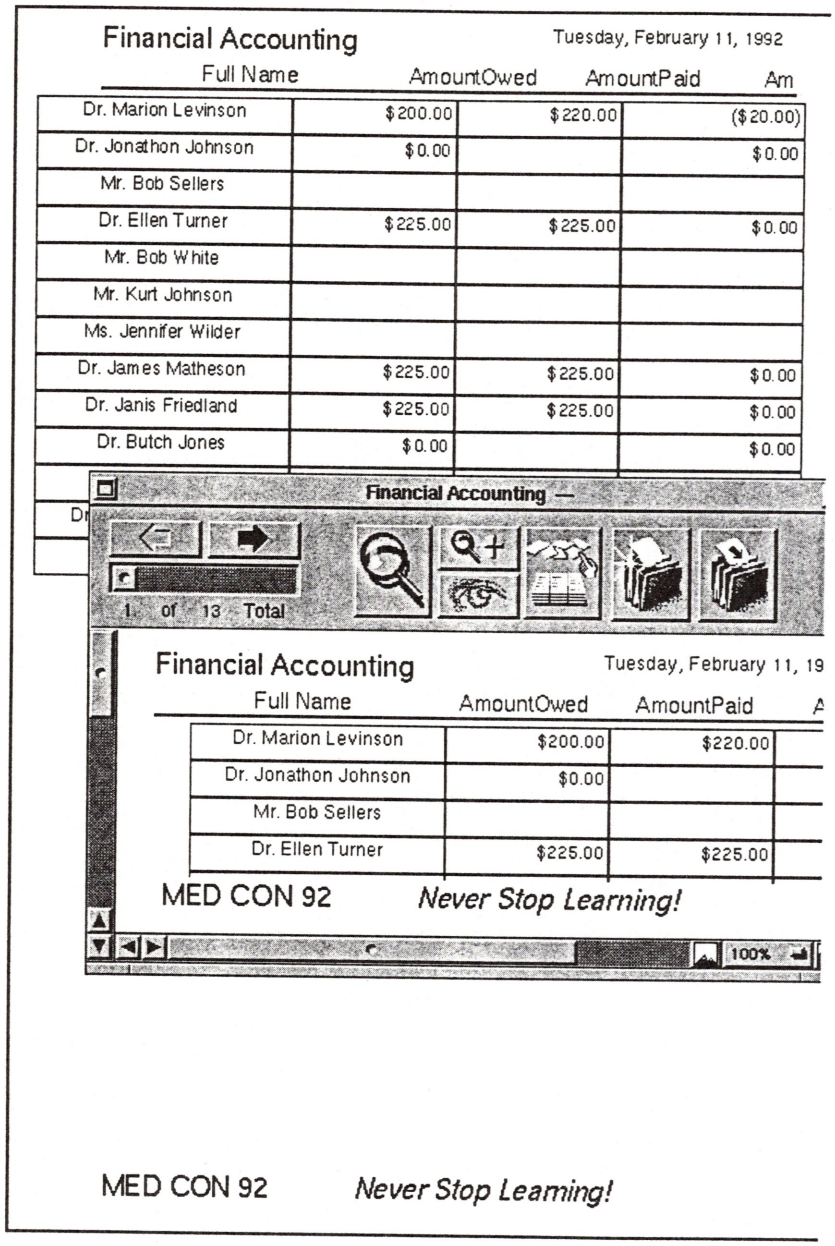
Header/Footer

To add a header or a footer to your key view, choose Header or Footer from the Page Parts submenu of the Design menu. A header is always placed at the top of your view; a footer is always placed at the bottom of your view. You can resize headers and footers vertically by clicking and dragging on one of their handles.



In a Card or Page view, the header and footer appear and are printed with each record. In a Report view, the header and footer appear at the top and

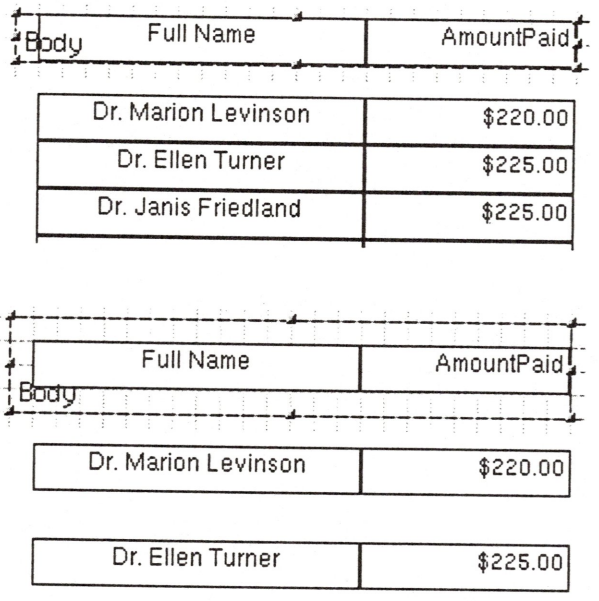
bottom of the view and the records are scrolled between them. When the records are printed, the header and footer appear on each page.



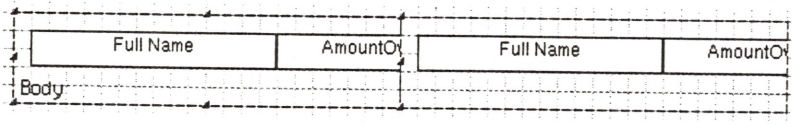
Record Body

A record body is a template for each record in a Report view. You modify the body to control the horizontal and vertical size of each record and its placement on the page.

To move a record body, select it (handles appear when the body is selected) and drag it. (See Chapter 5 for more information on selecting and moving objects.) Moving a report view body changes its horizontal position on the page. Resizing a record body changes the size of each record. By setting the vertical size of the report view body, you control how much vertical space there is between records and how many records fit on a page.



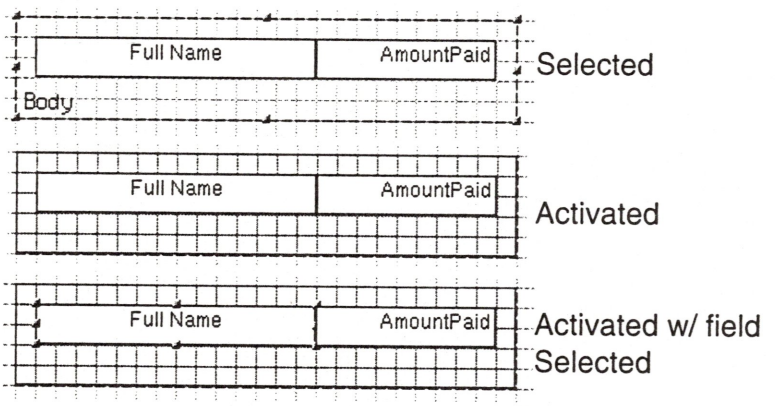
By setting the horizontal size of the record body, you control how many records fit across the page. **DataPhile** will automatically fit as many records as possible across the page; you can control this by setting the horizontal size of the report view body.



However, when you resize the record body horizontally, some of your fields may no longer appear in the record body. If this happens, resize the record body so that all of the fields are displayed and select and rearrange the fields within the body so that they will be displayed when you again resize the record body (see Editing the Contents of Parts below for information on how to select fields within the record body).

Editing the Contents of Parts

You can add, delete, and rearrange fields and graphic objects within headers, footers, and record bodies. When you double click on a part, that part becomes "activated." You can tell that a part is activated by its appearance:



When a part is activated, you can edit the objects within the part as described in Chapter 5. You can add objects, select objects for resizing and

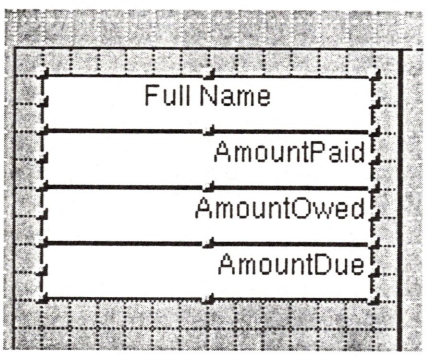
editing, and delete objects. You can rearrange the field layout for individual records to fit the kind of report you are creating.

Body Full Name	AmountPaid	AmountOwed	AmountDue
Dr. Marion Levinson	$220.00	$200.00	($20.00)
Dr. Jonathon Johnson		$0.00	$0.00
Dr. Ellen Turner	$225.00	$225.00	$0.00
Dr. James Matheson	$225.00	$225.00	$0.00

Full Name	Full Name	Full Name	Full Name
AmountPaid	AmountPaid	AmountPaid	AmountPaid
AmountOwed	AmountOwed	AmountOwed	AmountOwed
AmountDue	AmountDue	AmountDue	AmountDue
Body			
Dr. Marion Levinson	Dr. Jonathon Johnson	Dr. Ellen Turner	Dr. James Matheson
$220.00		$225.00	$225.00
$200.00	$0.00	$225.00	$225.00
($20.00)	$0.00	$0.00	$0.00

Selecting Fields In The Record Body

To select an individual field in a body, "activate" the body by double clicking on it so that a dark dashed line appears around it.



Once the body is activated, you can select the fields for moving, resizing and formatting using the standard selection techniques of clicking and dragging (see Chapter 5).

Adding Graphics to a Body

To add graphics to the body of a Report view, first activate it. Then, you can drag any TIFF or EPS image from the File Viewer into the selected body or paste them in using standard NeXT copy and paste techniques. You can also use **DataPhile**'s graphic tools and techniques within an activated body, header or footer.

Adding Page Markers

You can add one or more Page Number markers into a header or a footer of a key view at any time. To insert a Page Number marker, activate the header or footer, then choose Page Number from the Page Parts submenu of the Design menu. The Page Number marker (##) will automatically be replaced with consecutive page numbers when you print or preview records.

This Page marker can be moved or resize by clicking and dragging. Or, you can change its font by selecting it and applying a new font, style or size with the NeXT Font Panel.

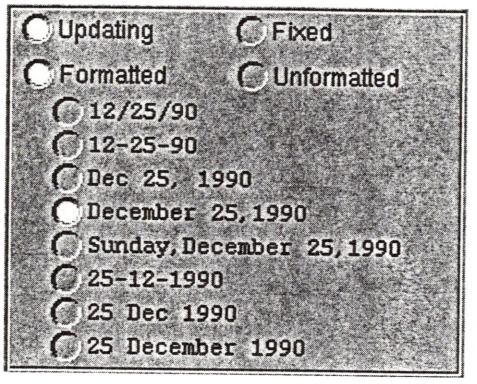
Adding Date Markers

You can also add one or more Date markers into a header, footer, or body of a key view at any time. To insert a Date marker, activate the header or footer in which you want it to appear and choose Date Marker from the Page Parts submenu of the Design menu. The Date marker will automatically be replaced with the current date. The default date format for the Date marker is Full Month, Day, Full Year.

February 12, 1992

This Date marker can be moved or resized by clicking and dragging. Or, you can change its font by selecting it and applying a new font, style or size with the NeXT Font Panel. You can format this date marker to display the date in different ways by selecting the marker and bringing up the Inspector panel (Command-1). The Date Format inspector will be loaded into the bottom bay of the Inspector panel. Its setting will apply to all

selected Date markers. You can make the Date marker either "Updating" (the default) or "Fixed".

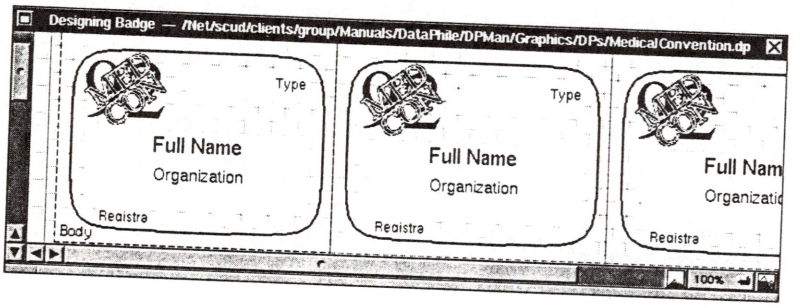


If the Date marker is Updating, it will automatically display the current date. If it is Fixed, the date marker will display the date the marker was created.

Chapter 5
Adding Fields and Graphic Objects to Views

Designing Views

DataPhile lets you design any number of views for viewing and printing your data and provides you with design tools that help you make them attractive and useful. **DataPhile** uses many of the same graphics methods as **Create** and thus provides you with a powerful design program within a database. In addition, you can use EPS, TIFF, and Create images in your view designs.



DataPhile's design tools include a Tool palette (which provides you with tools for adding and manipulating fields and graphic objects in your views), inspectors (which allow control over object characteristics and placement and field formatting) and other layout tools accessed from the Design menu. The images and shapes you work with in Design mode, including text and field objects, are treated as individual objects which can be moved, resized, modified and combined with other objects.

To modify a view, make the view key and place it in Design mode by choosing Enter Design Mode from the Design menu (Command-M). If the view is already in Design mode, this option won't appear in the menu; it is replaced by Return to Access Mode. When the view enters Design mode, the grid is visible and turned on. This means that placing and resizing objects are constrained by the grid. For more information on using the grid, see Grid Inspector under Inspectors below.

Working with Fields in Views

Enter Design mode when you want to add, delete or format fields in a view. You can also use Design mode to establish a Tab order for your fields.

The following instructions assume you are familiar with the concepts of selecting and the use of the Selection tool (arrow). If you are not, first read Selecting Objects below.

Adding Fields to Views

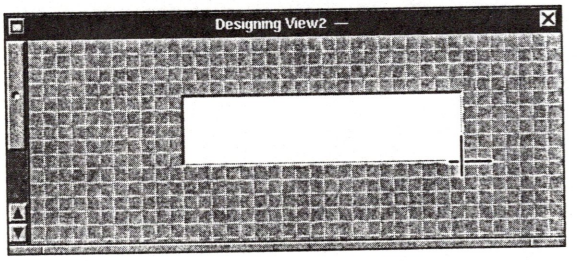
While you can create a view with no fields (Blank), you must have at least one field in your view before you can begin entering data. You may also want to add fields to an existing view. You can add any fields that have been previously defined in the Define panel.

There are two methods for adding fields to a view: the Tool method and the Palette method. With both methods, you must first make the view key by clicking on it or loading it from the View Browser.

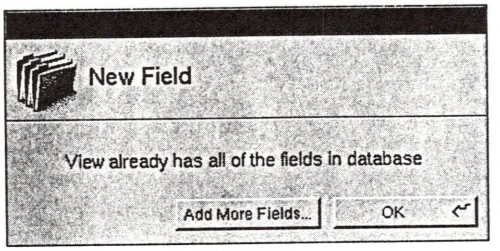
Tool Method

Choose the Field tool from the Tool palette.

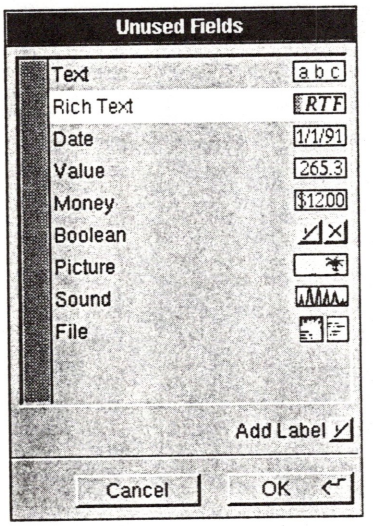
Draw a rectangle on the view that is the approximate size and in the approximate location of the field you want to add (you can change both the size and location later).



If the view already contains all the fields defined in the database, a dialog box will appear informing you of this and giving you the opportunity to enter the Define panel to define more fields.

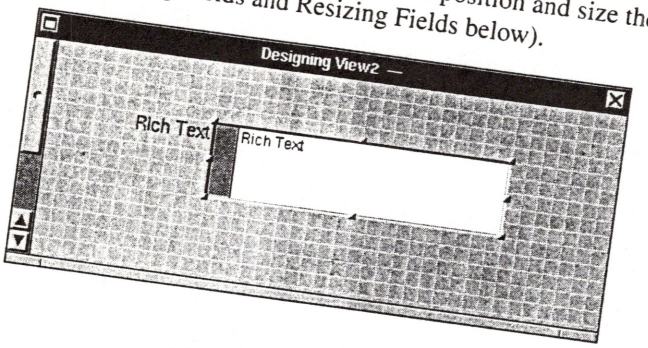


If there is at least one field available, an Unused Fields dialog box will appear with a list of all the fields that have been defined for the database but that do not yet appear in the key view. The order of the fields in this dialog box is determined by the order of the fields in the Define panel. You can change this order in the Define panel (see Chapter 3).



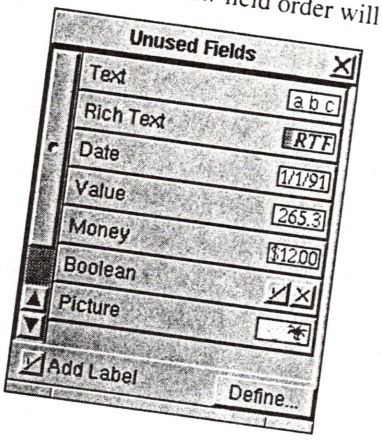
If you want a label added with the field, check the Add Label checkbox (its default setting is checked). If you don't want a label added with the field, uncheck it. You can always add a label later (see Adding Labels to Fields below). Then select the field you want to add by clicking on it once and pressing OK, or by double clicking on it. The rectangle you drew will

be filled with that field. You now can position and size the field as needed (see Moving Fields and Resizing Fields below).



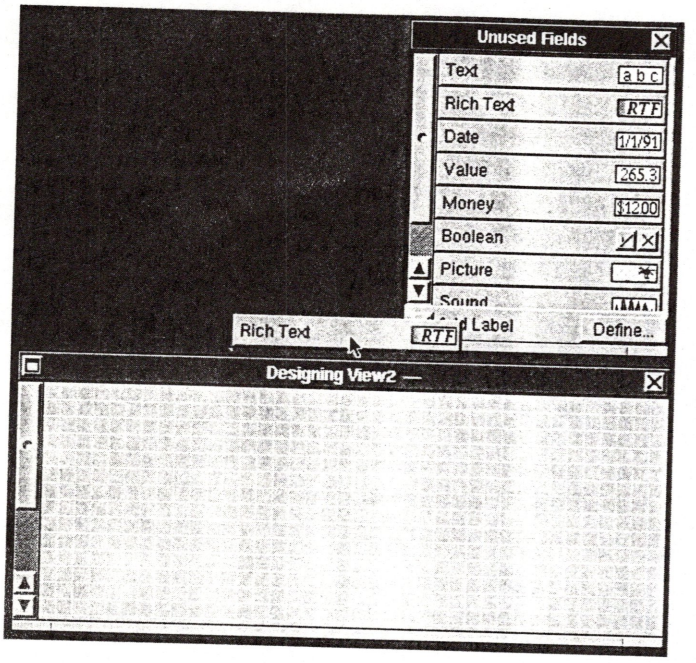
Palette Method

Choose Fields... from the Tools menu (Command-6). The Unused Fields palette will appear with a list of all the fields that have been defined but that do not yet appear in the key view. The order of the fields in this palette is determined by the order of the fields in the Define panel. To change the field order in the Unused Fields palette, open the Define panel by clicking on the Define button, rearrange the fields by dragging them and press Done. The new field order will be reflected in the Unused Fields palette.



Move your cursor into the palette area. Regardless of what tool you have selected in Design mode, once it is placed over the Unused Fields palette, the cursor will turn into an arrow. If you want a label added with the field, check the Add Label checkbox (its default setting is checked). If you don't want a label added with the field, uncheck it. You can always add a label

later (see Adding Labels to Fields below). Then, click on the field you want to add, drag it where you want it and release the mouse button.



This field will appear in the view at the location you dropped it. You can position and size it as needed (see Moving Fields and Resizing Fields below).

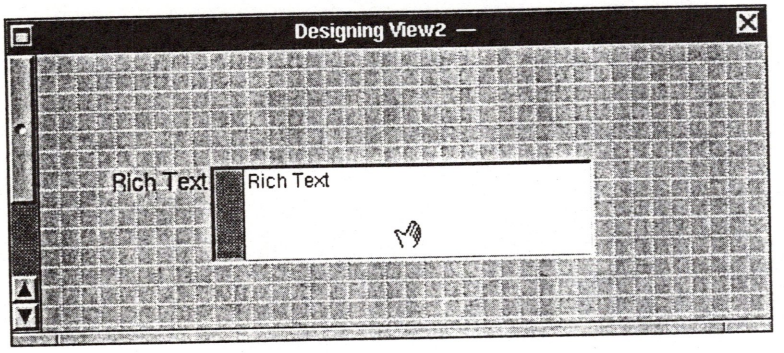
Adding Labels to Fields

If you add a field to a view without a label, you may later want to add the label to the field. To do this, select the field and choose New Label from the Page Parts submenu of the Design menu. A new field label will be added to the left of the field. As with field labels that are automatically added, you can move or resize this label as you please.

Moving Fields

To move a field, click in the middle of the field so that when you hold the mouse button down a small hand appears. You can now move the selected

field to any place on the view where the entire field and label (if it has one) fit within the view.



Normally, when you move a field, its label stays in the same relative position. When you move the label, the field does not move. If you want to move the field but not the label, hold the Alternate key while dragging the field.

Remember, the hand must appear for you to be able to move the field. If you click on one of the handles of the field, the hand will not appear and you will resize the field (see Resizing Fields below).

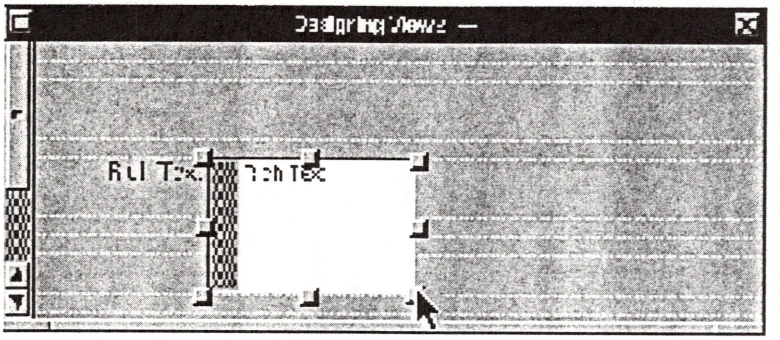
If you do not like a field's new location, choosing Undo from the Edit menu (Command-z) will put the field back in its previous location.

Hint: Holding down the Command key while moving the field allows you to move part or all of the field and/or its label outside the view area. If you do this, you may then want to resize the view so that the field and/or label is displayed.

Resizing Fields

You may want to resize fields to allow for more characters to appear in them, to allow larger pictures in Picture fields or to allow more of the file and path name to appear in Sound and File fields. To resize a field, choose the Selection tool and click on the field to select it. Use the Selection tool to grab any of the handles that appear and drag in the direction that you want to resize. If you want to make the field taller or shorter without affecting the width, resize using the handles in the middle of the top or the bottom side. If you want to make the field wider or more narrow without

affecting the height, resize using the handles in the middle of the left or the right side.



The only limit to the size of your field is the limits of the view you have created. See Resizing Views above for more information on how to resize views.

Hint: Holding down the Command key while resizing the field allows you to make the field extend beyond the view area. If you do this, you may then want to resize the view so that the entire field is displayed.

Deleting Fields

To delete a field from a view, select it and choose Delete from the Edit menu or press the Delete button on the keyboard. If you think you might want to paste the field back in, you can choose Cut (Command-x) from the edit menu, thus placing the field on the Pasteboard for later pasting.

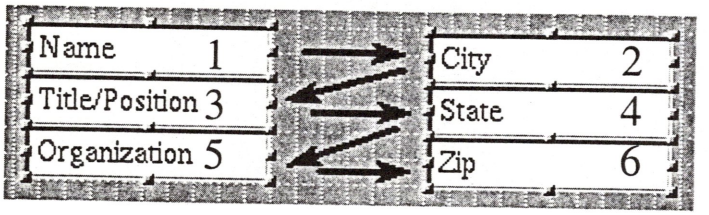
If you delete a field from a view, you can always add that field back to the view using the Field tool or the Unused Fields palette (see Adding Fields above).

Tab Order

One of the easiest ways to navigate through your fields in Access mode is to use the Tab key. The default Tab order for views is top to bottom (based on the bottom left hand corner of the field). When the bottom left hand corners of two or more fields are at the same point vertically, then the Tab order for those fields will be left to right.

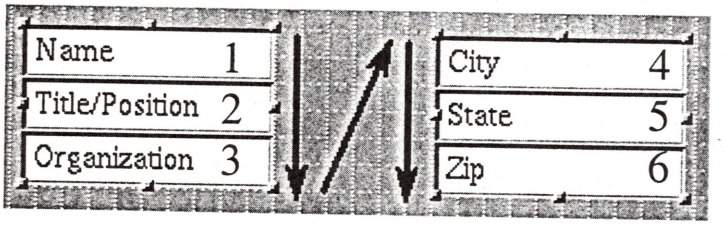
If you want to set a Tab order other than the default, group fields using the Group command. The default Tab order described above applies first within a group and then among groups.

For example, in the view below you have two columns of fields. The normal tab order would be:



However, you want to enter data down the column on the left first and then the one on the right.

To do this, select all the fields in the left hand column and choose Group from the Layer and Group submenu of the Design menu (Command-g). Then do the same thing with the fields that make up the column on the right. When you put this view back into Access mode, your Tab order will be the following:



If you want the Tab order to start with the right column, just nudge the right column higher than the left column.

To clear Tab orders for a group of fields, select the group and choose Ungroup from the Layer & Group submenu of the Design menu (Command-G).

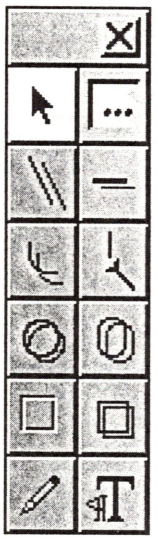
Formatting Fields

Field formatting is controlled in Design mode through the various Field inspectors. To change the formatting of a field, just double click on the field. Its appropriate inspector will be loaded into the Inspector panel and will provide you with the various formatting options for that field. For information on how to use the various Field inspectors, see Field Inspectors under Auto Inspectors below.

Working With Graphic Objects in Views

This section introduces you to the graphics capabilities included in Design mode in **DataPhile**. The graphic objects you create can be combined with background colors and fields to allow for endless ways of creating interesting and useful views for accessing and printing your data.

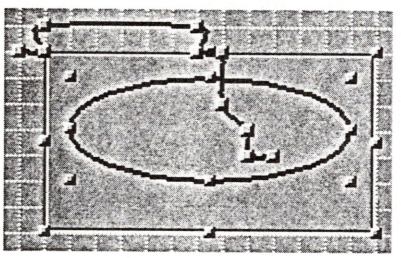
Tool Palette



When a view in Design mode becomes key, the Tool palette is placed at the view's upper left corner. Use the Tool palette to create and select graphic objects and fields. It can be hidden by clicking on its close button and unhidden by choosing Tool Palette...(Command 7) from the Tools menu.

Selecting Objects

Choose the Selection tool when you want to select objects for moving, cutting or editing. To select an object, click on it once. (Clicking twice both selects it and brings up the Inspector panel with the object's Auto inspector loaded into the bottom bay.) You can tell that an object is selected when handles (small rectangles) appear around the object's bounding box or along the object. The bounding box is an invisible rectangle that encloses the entire object. An object's bounding box may be different from its outline. You can set the size of the handles in the Preferences panel (see Preferences in Chapter 9). In the figure below, both the circle and freehand object are selected; you can see the handles on the invisible bounding boxes that surround the objects.

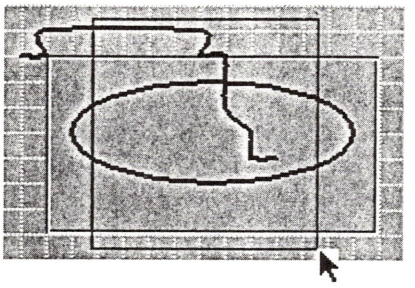


You can select one or more objects. You can select objects in several ways:

- Every object that you create is automatically selected. If you are creating a series of objects and you want them all to be selected, hold down the Shift key as you create the objects.

The remaining selection techniques all assume the Selection tool is chosen (the cursor is an arrow). If another tool is selected, you can temporarily select the Selection tool by holding down the Control key.

- If you want to select several objects at once, drag a selection rectangle around the objects you want to select. To create a selection rectangle, first be sure that the Selection tool is chosen. Then click in an area of the window where there's no object and drag diagonally—you will see a rectangle track your cursor. When you release the mouse button, the rectangle will disappear and any object whose bounding box intersects the selection rectangle will be selected.



- If you hold the Alternate key down when you begin to drag a selection rectangle, only objects that are completely enclosed in the rectangle will be selected.

- If you want to add single objects to a selection, hold the Shift key down while selecting each object you want to add to the group.

- If you want to add several objects to the selection, hold the Shift key down while you drag another selection rectangle.

- If you want to select all the objects in the window (including fields), choose Select All from the Edit menu (Command-a).

- If you want to select all the fields in the window, choose All Fields from the Edit menu.

- If you want to select all the labels in the window, choose All Labels from the Edit menu.

- If you want to select all the fields and labels in the window, choose All Fields & Labels from the Edit menu.

- If you have one object selected and you want to select all other objects of the same type (e.g., all ovals or all fields), choose All of Same Type from the Edit menu.

- If you want to deselect all objects, click somewhere in the window where there is no object. If you want to remove individual objects from a selection, hold down the Shift key while you click on each object you want to remove.

Creating Graphic Objects

The tools on the Tool palette (with the exception of the Field tool and the Selection tool) allow creation of simple graphic objects that can be incorporated into views. Below are descriptions of each tool and its uses.

Line

To draw a line at any angle, click on the Line tool and position the cursor (a crosshair) where you want the line to begin. Then, click and drag the cursor in the direction you want the line to go. As long as you hold the mouse button down, you can lengthen or shorten the line or change its direction. To finish the line, release the mouse button. The other end will be "nailed down." You may then change both the direction and length of the line by grabbing one of its handles with the Selection tool.

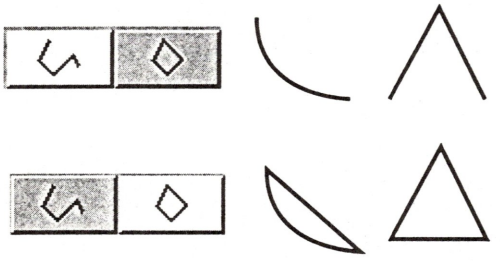
Straight Line

To draw a vertical or horizontal line, click on the Straight Line tool and position the cursor (a crosshair) where you want the line to begin. Then, click and drag the cursor in the direction you want the line to go. As long as you hold the mouse button down, you can lengthen or shorten the line or change its direction from vertical to horizontal. To finish the line, release the mouse button. As with the Line tool above, you may extend or shorten the line or change its direction after you have created it by grabbing one of its handles with the Selection tool.

Curve

To draw a curve, click on the Curve tool, position the cursor at the location where you want the first end and drag diagonally to the location where you want the opposite end.

You can create open or closed curves. You can control whether the newly created curve is open or closed with the Open Path and Close Path buttons in the Line Ends inspector.



For more information on how to control a curve's line path, line color and fill color, please see the description of the Line Ends inspector under Inspectors below.

Hint: If you hold down the Command key while you create your curve, you'll get a sharper curve.

Poly Line

Use the Poly Line tool to draw shapes with multiple line segments that are composed of angles and straight lines. To create a poly line, click and drag the mouse button. To end the first line segment, release the mouse button. Then, continue to click and drag to create each line segment. When you're done drawing your poly line, double-click or choose the Selection tool.

Hint: If you click the first point on a poly line you will set two points. Clicking and dragging eliminates this.

You can create open or closed poly lines. You can control whether the newly created poly line is open or closed with the Open Path and Close Path buttons in the Line Ends inspector (see Curve above). For more information on how to control a poly line's line path, line color and fill color, please see the description of the Line Ends inspector under Inspectors below.

Oval

To create an oval, click on the Oval tool, position the cursor at the location where you want the first edge, and drag diagonally to the location where you want the opposite "corner."

If you want a circle, press the Alternate key as you start to draw.

Round Box

To draw a round box, click on the Round Box tool, position the cursor at the location where you want one of the corners and drag diagonally to the location where you want the opposite "corner."

If you want equal sides, press the Alternate key as you start to draw.

Box Graphic

The Box Graphic tool allows you to draw standard NeXT boxes. To draw a Box Graphic, choose the Box Graphic tool, position the cursor at the location where you want one of the corners, and drag diagonally to the location where you want the opposite corner. Selecting a Box Graphic object always loads a Box Graphic inspector into the bottom inspector bay (the Box Graphic object's auto inspector). This inspector allows you control over the type and colors of your Box Graphic. For more information, please see Box Graphic Inspector below.

If you want a square box graphic, press the Alternate key as you start to draw.

Rectangle

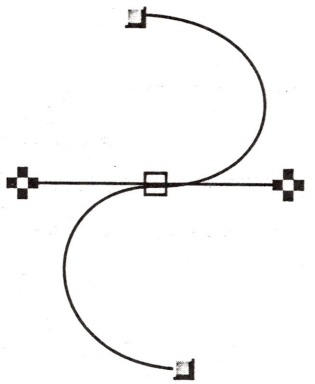
To draw a rectangle, click on the rectangle tool, position the cursor at the location where you want one of the corners and drag diagonally to the location where you want the opposite corner.

If you want a perfect square, press the Alternate key as you start to draw a rectangle.

Freehand

Use the Freehand tool to draw an irregular line just as you might with a pencil. In fact, the cursor changes to a pencil when you choose the Freehand tool. To draw a freehand shape, click on the Freehand tool, position the cursor where you want the line to begin and hold the mouse button down as you move the mouse along the path you want to draw. A newly created freehand object will turn into a spline when you finish drawing the object. This spline object will have control handles associated with each object handle that allow you to control the degree and direction of the curve.

To edit a freehand shape, you can click and drag the object handles to change the general nature of the shape. Or, you can click once on any object handle to display the control handles.



You can create open or closed freehand objects. You can control whether the newly created freehand object is open or closed with the Open Path and Close Path buttons in the Line Ends inspector. For more information on how to control a freehand object's line path, line color and fill color, please see the description of the Line Ends inspector under Inspectors below.

Hint: to get smoother objects, try zooming to 200%, and then creating the object.

Hint: holding down the Command key while you draw with the Freehand tools overrides the grid and generates a true freehand object whose multiple handles will not have associated control handles.

Paragraph Text

Paragraph text is Rich Text Formatted (RTF) text. The Paragraph Text tool lets you create single or multi-line field labels and allows you to create display text with multiple fonts. Paragraph Text allows you to format your text as you would in any word processor. You can change fonts, margins, set tabs, superscript, subscript and color individual characters. You can have multiple font and formatting instructions within a Paragraph Text object (see below).

The labels that are automatically created for fields are Paragraph Text objects, so you can use this tool to edit those labels.

To create a Paragraph Text object, click where you want your text to start and begin typing. You can use normal NeXT text editing techniques to enter and edit your text.

If, when editing an existing text object, your text starts disappearing, then it is extending beyond the limits of the bounding box of that text object. Just choose the Selection tool, click on the text object, and stretch the object so that all the text is visible. Stretching the bounding box of the text object does not modify the text itself.

There is a difference between applying format changes to a Paragraph Text object and to the text within the Paragraph Text object. You can apply format changes to a selection within the Paragraph Text object by highlighting a selection and then applying the changes. If you want the changes to

apply to the entire text object, you can select the text box itself and then apply your formatting changes.

Hint: To edit text in a Paragraph Text object, just double click on the word you want to edit. It will be highlighted.

Font:

After choosing the Paragraph Text tool, bring up the Font panel (Font Panel from the Font menu or Command-t) to set your font, font style, and size. You can change the fonts of the Paragraph Text objects in one of two ways. If you want to change the font in the entire Paragraph Text object, select the text object and bring up the Font panel. If you don't set a font, your text will use the default font that is set for labels in the Default Fonts panel in the Preferences panel.

Ruler:

To access the ruler, select the text within a text object that you want to format and choose Show Ruler from the Format menu (Command-r). You now can set tabs, margins and hanging indents. These ruler formats can be edited at any time. The default setting for the left margin of Paragraph Text is set at the first point at which you click to begin entering Paragraph Text.

You can also use the Paragraph Text tool to edit existing text objects (see Editing Text below).

Editing Objects

All the graphic objects, including text objects and fields, have certain characteristics that can be changed. All graphic objects, including Create, EPS, and TIFF images, can be moved, resized, cut, copied, and pasted. Fields can be moved and resized. In addition, you can use inspectors to change attributes of graphic objects and fields (see Inspectors below).

To edit an object, first select it.

Copying, Cutting and Pasting

You can duplicate objects and move them within your view, to other documents or to other applications that accept TIFF or EPS graphic formats by using standard NeXT editing commands. Select one or more objects and choose Copy or Cut from the Edit menu. This will place the object on the

Pasteboard. Move to the view or document you want to put the objects in and choose Paste. If you have used Cut to remove a field, you can then choose Paste to paste it back in. The Unused Fields dialog box will appear allowing you to choose a field for pasting into the view.

Deleting

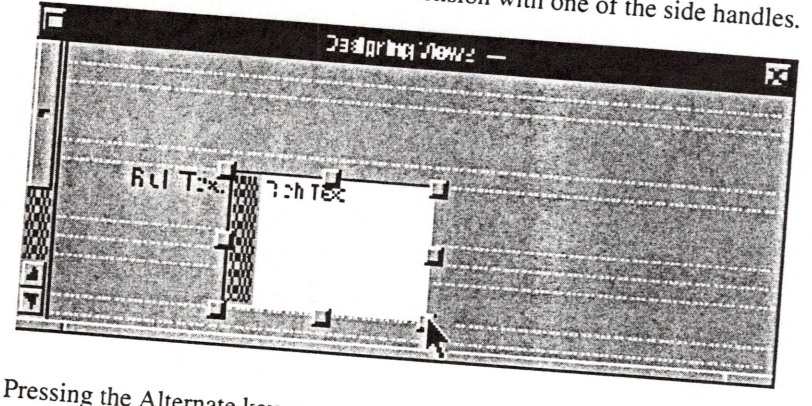
To remove objects and place them in the Pasteboard for later pasting, use the Cut command (above).

To remove objects without putting them in the Pasteboard, select the objects and choose Delete from the Edit menu or press the Delete key.

Choosing Undo from the Edit menu (Command-z) will restore your deletion.

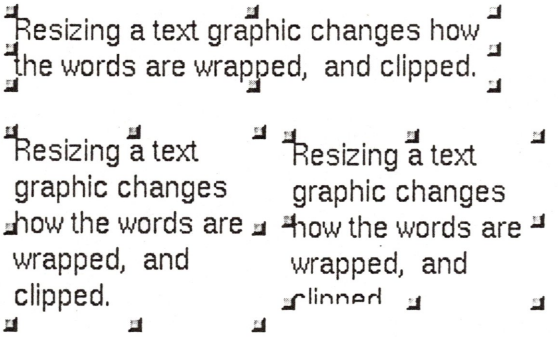
Resizing:

To resize objects directly, first select the object and then drag on one of its knobs. You can resize both horizontally and vertically with a corner handle or restrain your resize to one dimension with one of the side handles.



Pressing the Alternate key as you drag a handle resizes the object proportionally in most cases. With lines, the angle is constrained to the nearest multiple of 15 degrees (15, 30, 45, etc.). Resizing Paragraph Text changes

the size of the bounding box, but doesn't change the size of the text. Use resizing to change the Paragraph Text's layout.


Resizing a text graphic changes how the words are wrapped, and clipped.
Resizing a text graphic changes how the words are wrapped, and clipped.
Resizing a text graphic changes how the words are wrapped, and clipped

Editing Paragraph Text

You can edit text in Paragraph Text objects using standard NeXT text editing techniques. Select the text and use the Font panel or commands in the Font menu to change its font size, type, style and whether it is superscripted or subscripted. To select the text, you can either choose the Paragraph Text tool and drag over the desired text, or just double click on the desired text with the Selection tool.

You can also use the commands in the Text submenu of the Format menu to modify your selected text:

- Change its color to White, Light Gray, Dark Gray, or Black.
- Make it subscripted or superscripted.
- Change its margin alignment to left justified, right justified, or centered. Margin alignment applies to the whole text object; the other commands apply to selected text.

Remember that you can also change the text's margins by resizing the text's bounding box (see Resizing above).

Arranging Objects

Moving

To move objects, make sure you've chosen the Selection tool from the Tool palette. Position the arrow within the object you want to move. Drag the object to a new position and release the mouse button. As you drag, the cursor changes to a hand:

Hint: Holding down the Command key while moving the field allows you to move part or all of the object outside the view area. If you do this, you may then want to resize the view so that the object is displayed.

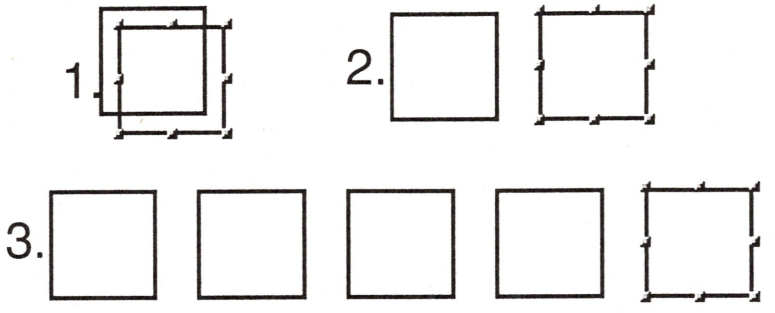
Nudging

You can move selected objects by single pixels (if the grid is not active) or by grid units (if the grid is active) with the arrow keys on the keyboard. See the description of the Grid inspector below for a complete description of the grid. You can also nudge objects by using the Nudge inspector (see Nudge inspector below).

Smart Paste

If you want to create a series of duplicate objects that are a set distance apart, use the Smart Paste feature. Create one of the objects, copy it and paste it. Now you have two objects with the newly created one selected. Move the new object to the position you want relative to the first object.

Now paste again. **DataPhile** places the new object in the same relative position to the second object as the second is to the first.



1. Copy and Paste object

2. Move object

3. Repeated pastes have same offset as the second paste from the original object

You can also use this feature to line up fields: add a field using either the Tool or Palette method. Set its font and alignment characteristics. Copy and paste the field (you'll get an Unused Fields dialog box so you can select a field). Move the second field to where you want it relative to the first field. Then use Smart Paste to add more fields.

Layering

Each object (whether single or grouped) has a front to back position in the view. Imagine that each object is on a sheet of acetate, and that the view displays all of these sheets layered one on top of the next. Each object is placed on top as it is created, but you can change the layering order with the following commands from the Layer & Group submenu of the Design menu.

- To move a selected object in front of all other graphics, choose Bring to Front (Command->). This will cause the graphic to be drawn or printed after all the other graphics.

- To move a selected object underneath all the rest, select Send to Back (Command-<).

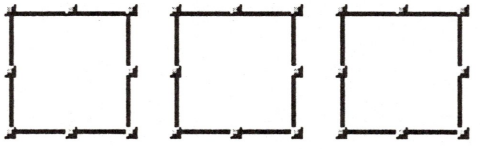
- To move a selected object one position forward, select Bring Closer (Command-+).

• To move a selected object one position further back, select Send Further (Command--).

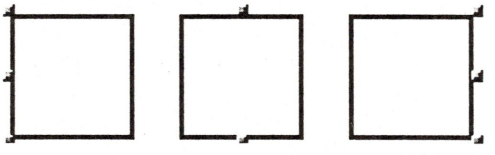
Grouping

You can group several objects into one combined object, which you then can manipulate as a single object. Grouping is useful for creating a complex object and for keeping related objects together. In **DataPhile**, you can also use Grouping to set a Tab order (see Tab Order above).

To create a group, select the objects you want to combine and choose the Group command (Command-g) from the Layer & Group submenu of the Design menu. After you group objects, handles appear on the bounding box of the new group object rather than on the individual objects:



All objects selected



All objects grouped

Once you've created a group object, you can group that object with other objects.

When you group objects, the entire group is placed at the same layer of the topmost object in the group.

You can also group a single multi-point object like a poly line or freehand object. This allows you to move the object without the possibility of changing its shape by dragging on one of its points.

Editing a group:

When you resize a group object, you don't change all the individual objects, but rather the size of the group's display box. You can also edit and move individual objects within their group by selecting them. To

select objects within a group, double click on the group to "activate" it (see View Parts in Chapter 4). Then you can select the objects within the group for resizing, moving and modification.

Locking

If you want objects to no longer be selectable (which means they can't be changed in any way), you can lock them. To lock objects, select them and choose Lock (Command-l) from the Layer & Group submenu of the Design menu). The objects become part of the background.

Unlocking (Command-L) unlocks all previously locked objects.

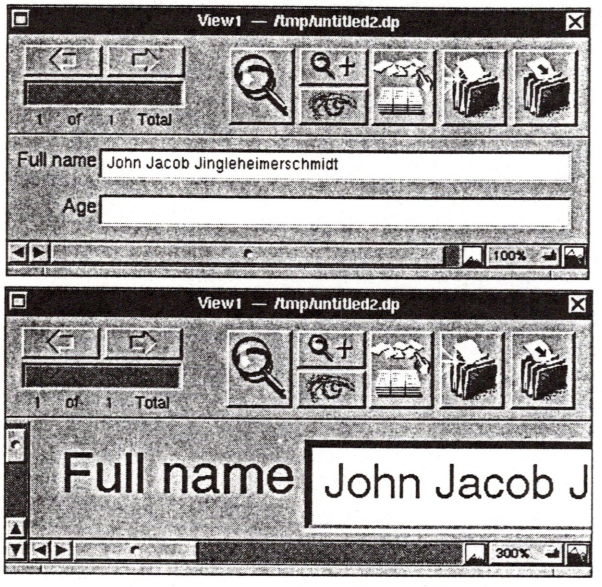
Zoom

Use the Zoom control when you want to look at a magnified or reduced view of your image. You can access the zoom pop-up menu in two ways: Choose Zoom from the Tools menu and then click on the view that you want or click on the pop-up menu in the bottom right hand corner of the window that appears when you have selected any zoom level other than 100%. In the window pop-up, you have the option of choosing the Set command which allows you to choose any zoom level. You'll find a magnified view particularly useful when you're arranging objects closely. The default zoom view is 100%.

Click on the small mountains to zoom one level out, and click on the large mountains to zoom one level in.

Remember that zooming changes your view of the image, not the image itself. When you copy and paste an image, it will have its unzoomed size.

Below is a view magnified three times:

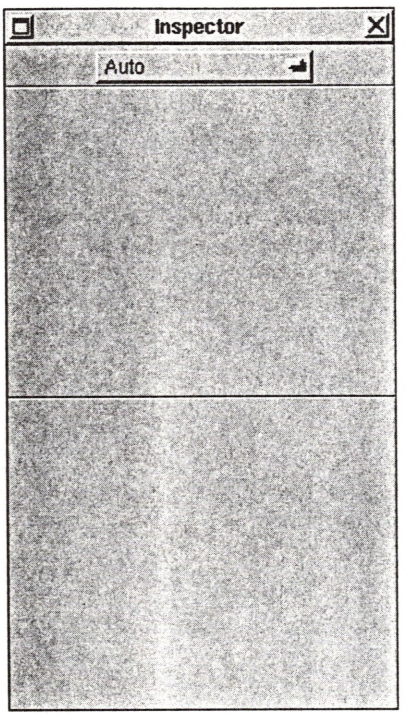


Hint: To zoom in quickly on an object, Control-Shift click zooms in, and Control-Alternate-Shift click zooms out.

Inspectors

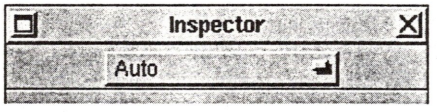
DataPhile uses inspectors to modify various object characteristics including graphic object attributes like line width and line color, type specific

field formats like a date format, and layout characteristics like alignment. The various inspectors are loaded into the following Inspector panel.



To bring up the Inspector panel, choose Inspector... from the Tools menu (Command-1) or double click on any object in the view. The Inspector panel contains two bays. The top bay is controlled by the pop-up menu at the top of the Inspector panel. Also, all objects have an Auto inspector which is loaded into the bottom bay of the Inspector panel when you select an object. If Auto is chosen on the pop-up menu, then an object's "second" inspector (the one you would be next to most likely to want to use) will be loaded into the top bay and the Auto inspector is loaded into the bottom bay. If you click on the background, the Grid inspector will be loaded into the bottom bay.

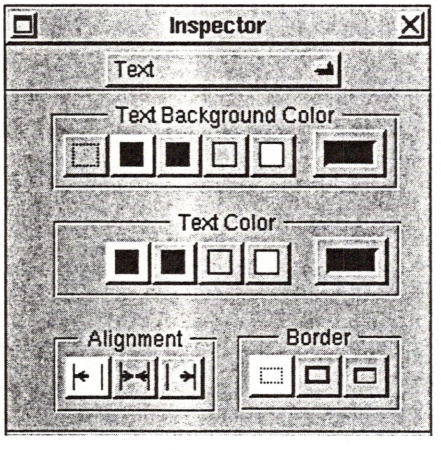
Auto Inspectors



When Auto is selected from the inspector pop-up menu, a selected object's second inspector will automatically be placed into the top bay. A selected object's Auto inspector will be loaded into the bottom bay.

If no object is selected, the top bay will be empty, and the Grid inspector will be loaded into the bottom bay.

Text Inspector



Use the Text Inspector to set background color, text color, alignment and border on selected text fields and field labels. (To add a label to a field that doesn't have one, see Adding Labels to Fields above.)

Text Background Color:

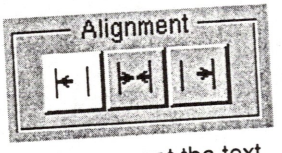
Click on one of the default colors to select a color for your text background, or use the color well to load one from the NeXT color panel.

Text Color:

Click on one of the default colors to select a color for your text, or use the color well to load one from the NeXT color panel.

Alignment:

Use the alignment buttons to set the alignment of text within fields and field labels. To set the alignment of different paragraphs in the field label, highlight the paragraph and choose the alignment from the Text submenu of the Design menu.

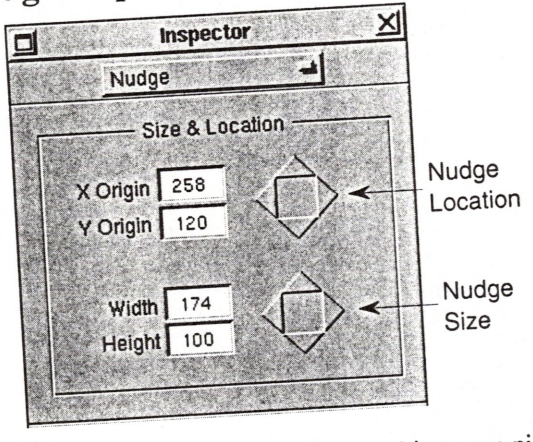


You can set the text alignment of a paragraph either left, right or center aligned

You can set the text alignment of a paragraph either left, right or center aligned

You can set the text alignment of a paragraph either left, right or center aligned

Nudge Inspector

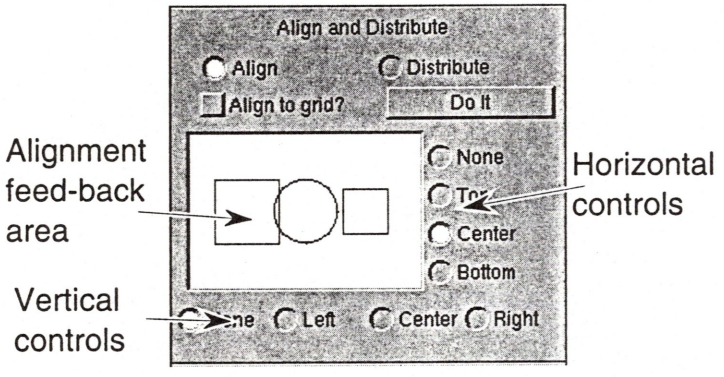


Use the Nudge inspector to move objects one pixel at a time, or to set an object's exact size and location. To access the Nudge inspector, choose Nudge from the inspector pop-up menu or Nudge... from the Align sub-menu of the Design menu. Clicking on the arrows in the inspector allows you to change the location or size of the selected object by one pixel regardless of whether the grid is active or not.

Enter grid locations into the X Origin and Y Origin text entry boxes to set the exact location of the lower left hand corner of the object. To set the exact size of an object, enter its size into the Width and Height text entry

boxes. The units of measurement for all the text entry boxes in the Nudge inspector (inches, centimeters, points or picas) will be the same as the ruler units as set in the Preferences panel. See Preferences in Chapter 9 for more information on setting ruler units.

Align and Distribute Inspector



The Align and Distribute inspector helps you position groups of objects in relation to each other.

Choose Align from the inspector pop-up menu to lock the Align and Distribute inspector into the top bay. Or, choose Alignment from the Align submenu of the Design menu.

Align

To align objects, first select the objects (there must be more than one) which you want to align. Then, set the type of alignment with the Align and Distribute inspector. Click on the Do It button or choose Align from the Object menu to apply the alignment to selected objects.

Align to Grid?

When you align objects to the grid, you specify that an object's boundaries will line up with the grid, horizontally or vertically or both depending on what is selected in the Horizontal and Vertical controls. When you align more than one object to the grid, **DataPhile** aligns the top-layered object to the grid and then lines up the rest of the objects with the top object. If you want to change the object on top, you must reestablish the layering order (see Layering above).

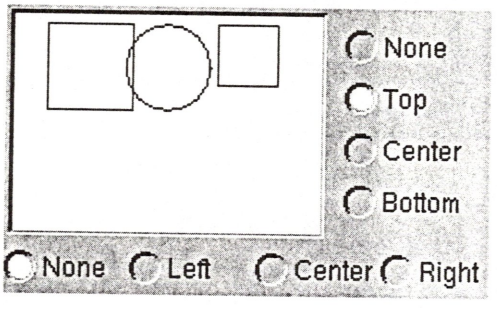
Setting the alignment

Choose whether you want objects to align to each other or to the grid and each other. In order to align with the grid, the grid must be on.

When you align objects with each other, you can specify that the objects' boundaries line up horizontally or vertically. Objects line up with the selected object that is closest to the top of the layering order.

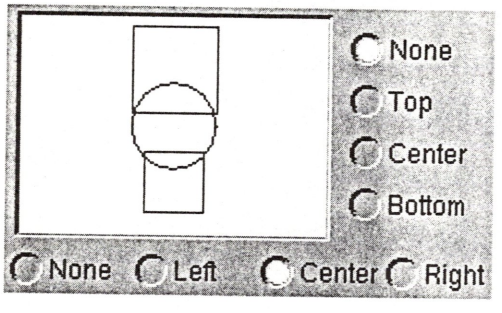
Horizontal Alignment

Choose None, Top, Center or Bottom alignment by clicking one of the radio buttons at the right side of the Alignment feedback area.

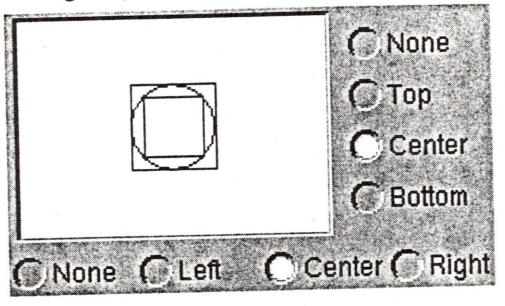


Vertical Alignment

Choose None, Left, Center or Right alignment by clicking one of the radio buttons at the bottom of the Alignment feedback area. Below is an example of objects vertically aligned at the center of the Alignment feedback area.



Or align objects both vertically and horizontally:



Aligning objects repeatedly:

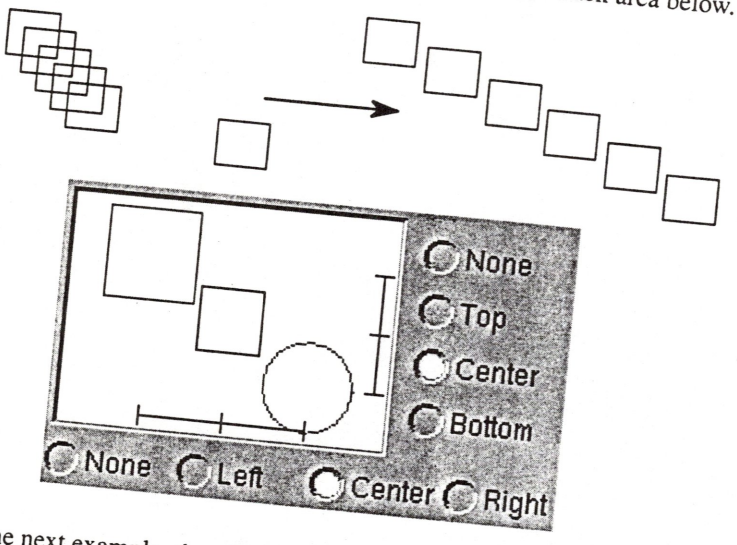
After you've set a specific alignment in the Alignment inspector, you can align objects without opening the panel each time. Select the objects you want to align and choose Align from the Align menu.

Distribute

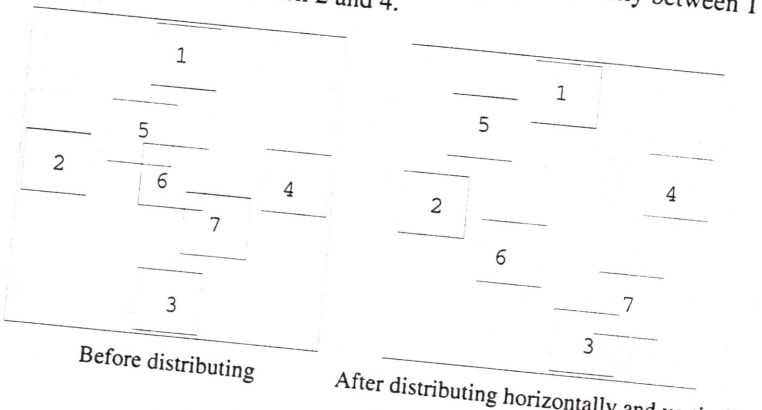
Distribute is enabled only when three or more objects are selected. The Distribute option distributes the objects evenly within the space they occupy. Vertical distribution distributes the objects evenly between the top-most and bottom-most objects. Horizontal distribution distributes the objects evenly between left-most and right-most objects. The horizontal and vertical placement of each object is determined independently. The placement of each object is also determined by the horizontal (none, left, right and center) and vertical settings (none, top, center and bottom). Thus, if the horizontal setting is left and the vertical setting is center, the objects will be distributed based on the center of their left side. After you have established your distribution method, click on the Do It button.

As with Align, you can distribute to both directions to achieve different effects. In the first example below, one object is both the highest and the furthest left, while another object is the lowest and the furthest right. The

objects are distributed evenly between the two objects at the extremes using the controls that appear in the Alignment feedback area below.



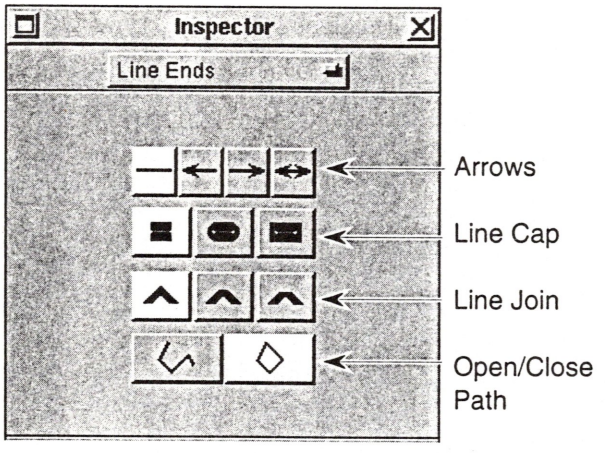
In the next example, the objects are distributed vertically between 1 and 3 and horizontally between 2 and 4.



Before distributing

After distributing horizontally and vertically

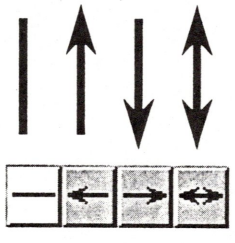
Line Ends Inspector



Use the Line Ends Inspector to control how the ends of lines and open freehand shapes, curves and poly lines appear. You can also control whether curves, freehand shapes and poly lines are open or closed.

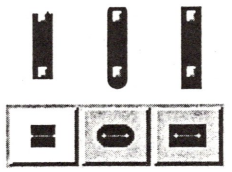
Choose Line Ends from the inspector pop-up menu to load the Line Ends inspector into the top bay.

Arrows



The Arrow controls allow you to add arrows to the ends of selected lines, freehand shapes, curves, and poly lines. The size of the arrowhead is proportional to the line width.

Line Cap



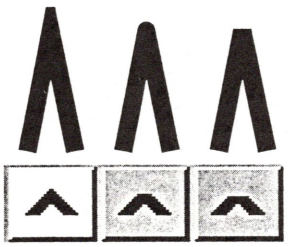
The Line Cap controls determine what the ends of selected lines, freehand shapes, curves, and poly lines will look like.

Chopped: the line is squared off at its end point; there is no projection beyond the end of the path.

Rounded: A filled semicircular arc is drawn around the end point.

Square: The line is squared off beyond the end point at a distance equal to half the line width.

Line Join



Miter Round Chopped

The Line Join controls determine how corners on rectangles and poly lines will look.

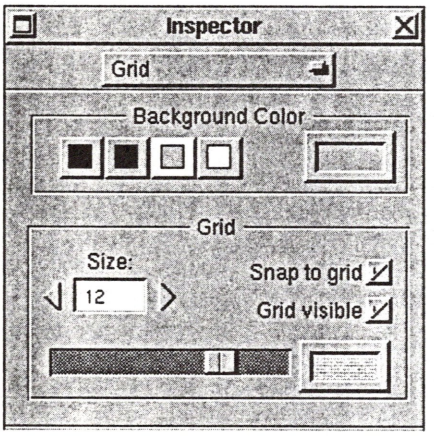
Open/Closed

Open Path Close Path

These buttons control whether the outline of a curve, freehand shape, or poly line has an open path, or whether an extra line segment is automatically drawn to give it a Closed Path.

The default setting for a newly created object is Open Path. You can also simulate a closed path by applying a Fill color using the Fill Color button in the Auto inspector (the Fill will follow the same path as a closed outline). However, if you make the line color different from the fill color, you will see that the line path is still controlled by the Open Path and Close Path buttons in the Line Ends inspector.

Grid Inspector



Use the Grid inspector to set the Grid and background color in your view. Choose Grid from the inspector pop-up menu or Grid... from the Align submenu of the Design menu to lock the Grid inspector into the top bay. The Grid inspector also is automatically loaded into the bottom bay if nothing is selected in a view.

Background Color

Set the background color of your view by clicking on one of the default background color settings, or use the color well to load one from the NeXT color panel.

Grid

Use the grid to help you accurately place and size objects.

Snap to grid:

Checking this box makes the grid active and all objects you create align automatically to it. You will only be able to size objects in grid increments and all objects will only move in grid spacing increments.

Grid Visible:

When this button is checked, the grid will be visible to you on the screen, but this grid will not print out. You can control the color of the grid by clicking on the color well below this button, or by using the slide control to the left of the color well. The default is 0.83 (lighter than Light Gray).

Size:

Use the text field to enter a grid size in preferred units (inches by default), or use the buttons on either side of the text field to increase or decrease the size to standard sizes. The preferred units are controlled through the Ruler Units button in the Preference panel (see Preferences in Chapter 9).

You can use the grid to help you make objects of specific sizes by setting the grid size appropriately. The default setting for grid size is .167 inches or 12 points. If you set a grid smaller than 4 points, you won't be able to make the grid visible, but it can still be active.

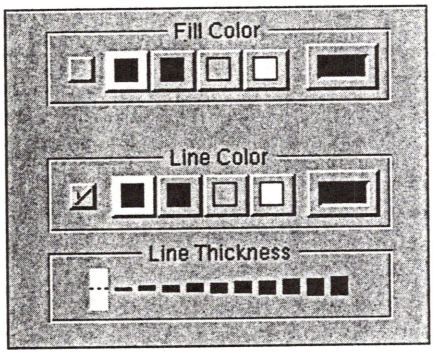
The Snap to grid and Grid visible controls are independent. The grid can be visible but inactive if you want a visual aid to lining objects up, but don't want the grid constraint. Or, it can be invisible but active if you want the constraint without the visual distraction of the grid.

You can also control whether the grid is active or visible from the Format menu. Turn Grid On (command-[), which toggles to Turn Grid Off, controls whether the grid is active. Show Grid (command-]), which toggles to Hide Grid, controls visibility.

Auto Inspectors

All of the Graphic objects (except for the Box Graphic and the Text object) share the same Auto inspector, the Graphics inspector. Box Graphic and Text objects, and all of the field types have their own Auto inspectors. A selected object's Auto inspector is always loaded into the bottom bay in the Inspector panel.

Graphics Inspector



The Graphics inspector provides controls for the Fill color, Line color and Line thickness for selected lines, curves, poly lines, ovals, round boxes, rectangles and freehand objects.

Fill Color:

Click on one of the default colors to select a color for the selected object's fill, or use the color well to load one from the NeXT color panel.

Line Color:

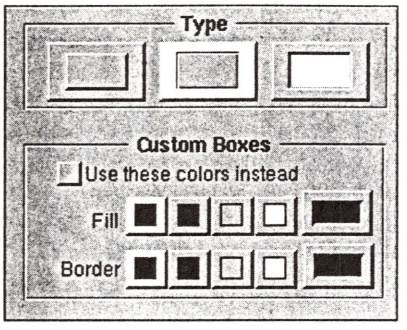
Click on one of the default colors to select a color for the selected object's line, or use the color well to load one from the NeXT color panel.

Line Thickness

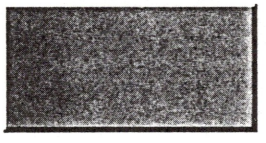
Use the Line thickness control to determine the thickness of the outline line of a selected object. To set a line width, click on one of the line widths along the control.

If a fill color is also applied, you will not be able to see the line unless it is a different color than the fill.

Box Graphic Inspector



The Box Graphic inspector controls the type and color of the fill and border of NeXT boxes. You can create "NeXT Interfakes" with this tool, and even add colors to the standard NeXT looking boxes. Click on Use These Colors Instead and load any colors from the NeXT color panel into the fill and border wells to create your own look.



You can control the type of your Box Graphic either by selecting the type you want before drawing the box, or selecting the box after it is drawn and clicking on the box type you want. You can also fill the center and the border with custom colors by checking the Use These Colors Instead box and selecting colors.

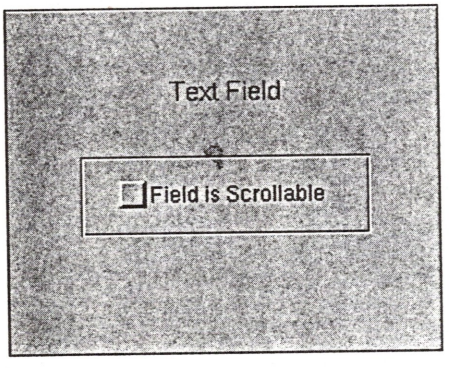
Paragraph Text Inspector

The Paragraph Text object's auto inspector is the Paragraph Text inspector. This inspector allows you to control the text color and alignment of selected Paragraph Text objects. These text color and alignment controls are the same as those on the Text inspector (used for editing the characteristics of selected field labels). See Text inspector above for a description of the controls.

Field Inspectors

The Field inspectors control the data formatting in Access mode. Formats control how the information is displayed and can be set differently for each view. Each field type (as defined in the Define panel) has an associated Auto inspector. These Auto inspectors will be loaded into the second bay of the Inspector panel when you double click on the field. For information on field types, see Chapter 3.

Text Field Inspector

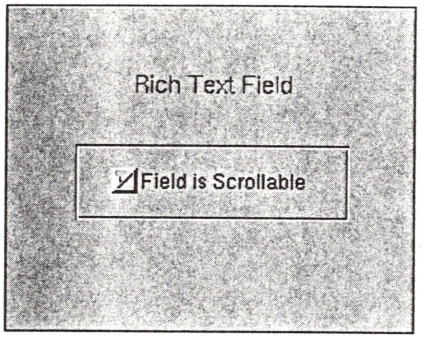


Use the Text Field inspector to control the display of fields defined as Text.

Field is Scrollable:

When this button is checked, the selected field will become a scrollable field. When a field is scrollable, you can enter as much text as you like, and it will all be available for viewing via the scroll bar. You can also enter Returns directly into your text. When a field is not scrollable, you can enter as much text as you want, but there will be no line wrap. To enter a Return into a non-scrollable field, enter an Alternate-Return. The default setting for this option for Text fields is Off (unscrollable).

Rich Text Field Inspector

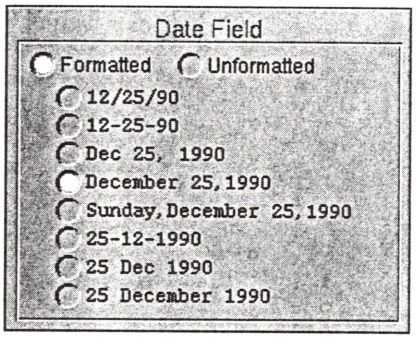


Use the Rich Text Field inspector to control the display of fields defined as Rich Text Formatted (RTF). For information on the difference between RTF and Text fields, see the description of each field type in Chapter 3.

Field is Scrollable:

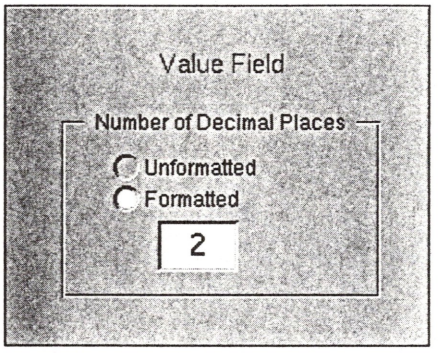
When this button is checked, the selected field will become a scrollable field. When a field is scrollable, you can enter as much text as you like, and it will all be available for viewing via the scroll bar. The default setting for this option for RTF fields is On (scrolling).

Date Field Inspector



Use the Date Field inspector to select how you want dates formatted. The default format for Date fields is full month, day, full year. If you select Unformatted, the date will be displayed exactly as you entered it.

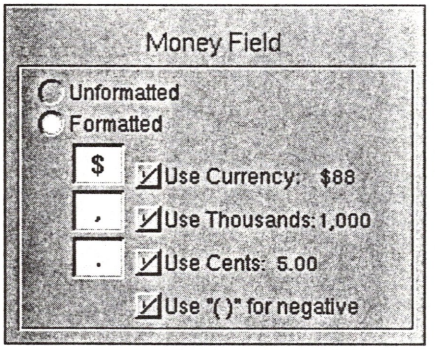
Value Field Inspector



Use the Value Field inspector to control the display of Value fields.

The default format for value fields is Unformatted, which means that the value will appear as entered, including any non-numeric characters. When the Formatted button is checked, you can enter the number of decimal places that you would like to appear in your value. Values that are formatted to display fewer decimal places than the value contains are rounded for display purposes only. A formatted value displays only the numeric value; any non-numeric characters are not displayed.

Money Field Inspector



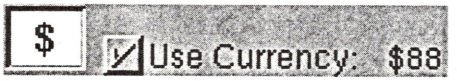
Use the Money Field inspector to format Money fields

The default format for Money fields is Formatted to use a currency symbol, to indicate thousands, to display cents and to use parentheses for negative.

Formatted vs. Unformatted:

When the Formatted button is selected, any formatting options that are checked will apply to the field. Any non-numeric characters entered will not be displayed. When Unformatted is selected, the data will be displayed exactly as it is entered. This means that you can enter both symbols and numbers into a money field. This is useful when you want to use different currency symbols within one database.

Currency:

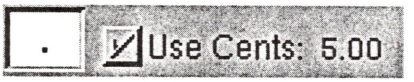


Enter the currency symbol of your choice into this text entry box. Examples of currency symbols would be $ (U.S. Dollar), £ (British Pound, accessed by pressing Alternate-3), and ¥ (Japanese yen, accessed by pressing Alternate-Y). Currently, only a single alphanumeric character is supported.

Thousands:

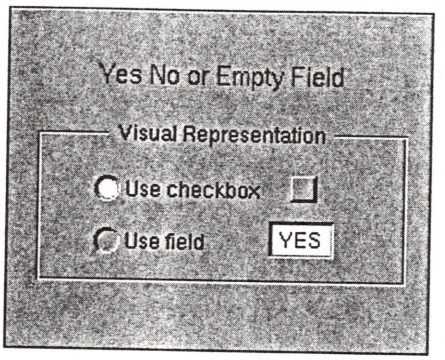
Enter the thousands symbols of your choice into this text entry box. Examples of thousands symbols are a comma (U.S.) or a period.

Cents:



Enter the symbol you want to separate currency from fractional currency into this text entry box. Examples are a decimal point or a comma.

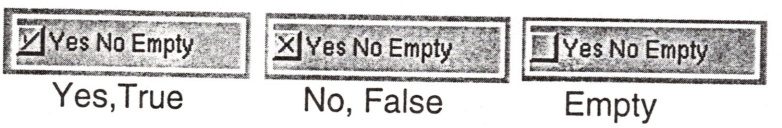
Yes/No/Empty Field Inspector



Use the Yes/No/Empty Field inspector to format Yes/No/Empty fields.

Use Checkbox:

Click on Use Checkbox if you want the Yes/No/Empty field to appear as a checkbox as in the following examples.



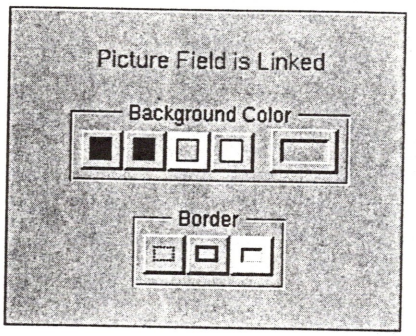
Yes,True No, False Empty

Use Field:

Click on Use Field if you want the Yes or No value in a field to be displayed as a "Y" or a "N." Empty value will remain empty.

Yes,True No, False Empty

Picture Field Inspector



Use the Picture Field inspector to control the display of selected Picture fields. This inspector also indicates whether a selected Picture field has been defined as linked or copied

Status:

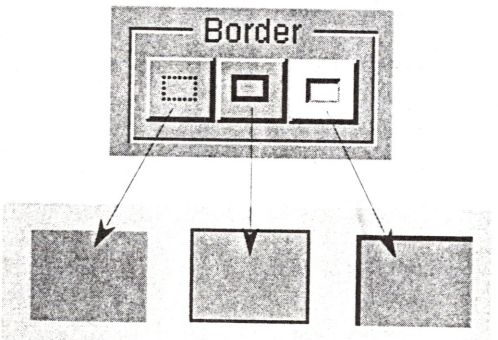
This message will tell you whether selected Picture fields are linked or copied. See Chapter 3 for more information on creating and using linked and copied Picture fields.

Background Color:

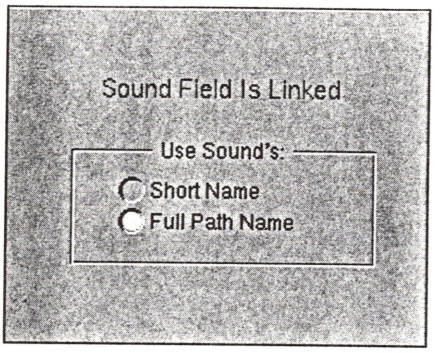
To set the background color of a picture field, click on one of the default background colors or click on the color well to set a color through the standard NeXT color panel.

Border:

Click on one of the three border settings to change the border of the picture field.



Sound Field Inspector



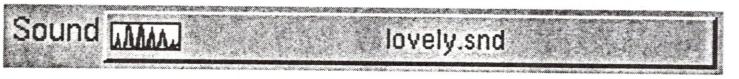
Use the Sound Field inspector to control the display of selected Sound fields. This inspector also indicates whether selected Sound fields have been defined as linked or copied.

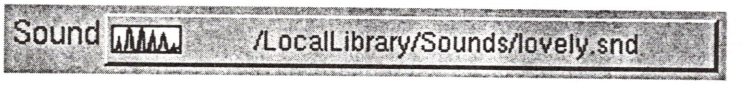
Status:

This message indicates whether selected Sound fields are linked or copied. See Chapter 3 for more information on creating and using linked and copied Sound fields.

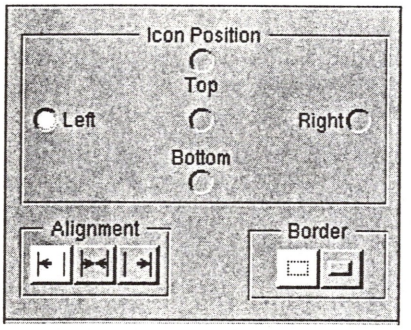
Use Sound's:

These buttons determine what name will appear in the selected Sound field. When Short Name is clicked, just the sound's file name (or as much of it as will fit in the sound button) will be displayed in the sound field. When Full Path Name is chosen, then the sound's name will appear along with its full path from root (or as much of it as will fit in the sound button).





Button Inspector



Use the Button inspector to control the display of File, Sound and Yes/No/Empty buttons.

Icon Position:

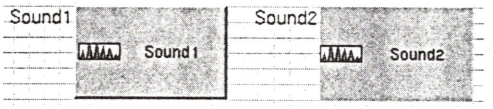
This radio button determines where the title of the button will appear. The center button means that no title will appear, which is useful when you have a file field for faxes from Mail with very long names, or for Yes/No/Empty field checkboxes when you don't want the field's name to show.

Alignment:

This button determines how the text is aligned on the button.

Border:

This button determines whether the button receives a border or not.



Adding Graphic Objects from Other Programs

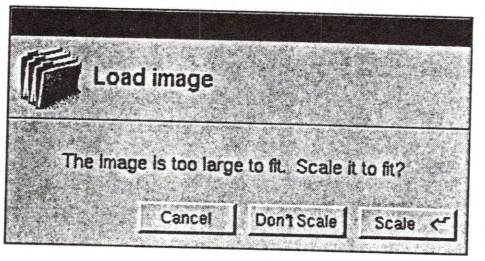
It is easy to incorporate graphics from other programs into your **DataPhile** view. You can use the Pasteboard, or certain types of files can be dragged from the File Viewer directly into the view.

Pasteboard Method

Copy a selection from any program to the Pasteboard and then paste it into **DataPhile**. Once the object is in **DataPhile**, you can cut, copy, paste, move and resize it, but you cannot edit any of its characteristics (color, line width, etc.).

File Viewer Method

EPS, TIFF, and CreateImage files can all be dragged from the File Viewer and dropped into a view. If the image is larger than the view, you will receive a message allowing you to scale the image or leave it in its original size, unless you have specified in your Preferences panel that you want **DataPhile** to automatically scale or not scale (see Preferences in Chapter 9).



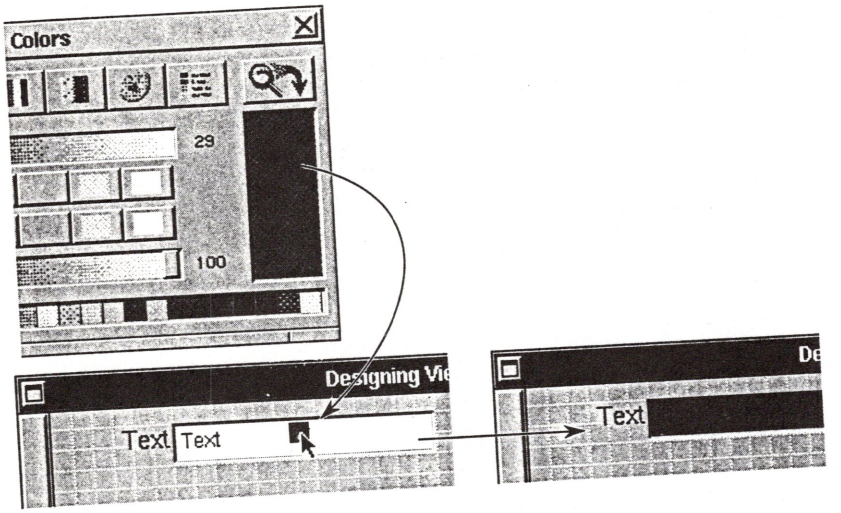
As with images that have been placed in a view with the Pasteboard method, once the object is in **DataPhile**, you can cut, copy, paste, move and resize it, but you cannot edit any of its characteristics (color, line width, etc.) If you choose not to scale an image, you will not see the full image until you resize your view.

Special Color Controls

Drag-On Colors

DataPhile uses the standard NeXT color well interface to control colors (see Chapter 7 in your NeXT User's Reference Manual). However, in Design mode in **DataPhile**, you can also drag colors from the NeXT color palette directly onto an object. Any effect that has color capabilities can

have its color assigned in this way. Dragging the color black inside of a circle gives the circle a black fill. The new fill color will be reflected in the color wells in the appropriate inspectors.

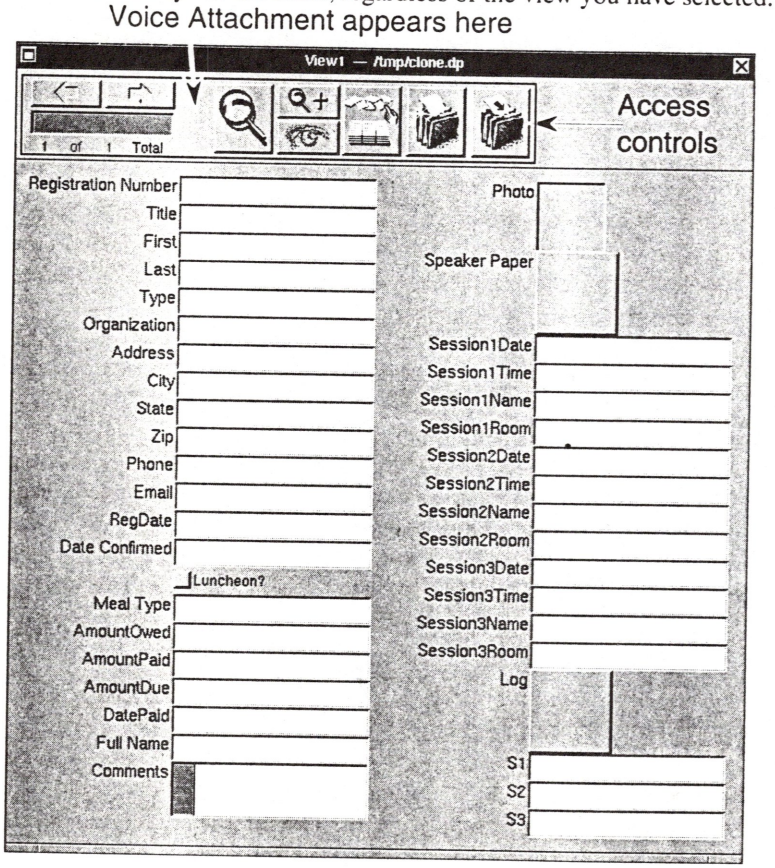


Chapter 6
Accessing the Database

Accessing Data

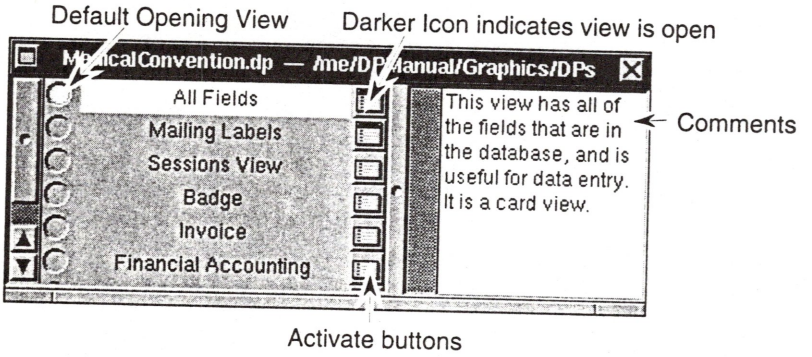
When you want to view, enter, find, sort or print records in a view, put the view into Access mode. If the view is in Design mode, choose Return to Access Mode from the Design menu (Command-M) to enter Access mode. When the view is in Access mode you can view your records individually (View as Card), or as many records at once (View as Report).

Below is a sample default view in Access mode. The controls in Access mode will always be the same, regardless of the view you have selected.



Choosing a View

You can enter or review your data in any view in your database. Use the View Browser (below) to open views, make a view key, and select which view should be automatically loaded when you open your database. Every open database has a View Browser. To display the View Browsers, choose View Browser from the Tools menu. Use the Preferences panel to set whether you want the View Browser to appear automatically when a database is opened (see Preferences in Chapter 9).


Default Opening View
Darker Icon indicates view is open
All Fields
Mailing Labels
Sessions View
Badge
Invoice
Financial Accounting
This view has all of the fields that are in the database, and is useful for data entry. It is a card view.
Comments
Activate buttons

To open a view for use, click its activate button (the button to its right). An open view has a darker icon in its activate button. You can have more than one view open at once, but only one view can be key at a time. To make a view key, either click on the view itself or on its activate button in the View Browser.

To set the view which will be automatically opened when you open your database, click on the radio button to the left of the view. You can set any of the views to be the default opening view.

To close a view, click on its window's Close button, or choose Close Window from the Windows menu (Command-w). Use the View Browser to reopen any view. To close a database, choose Close form the Database menu (Command-W) or close all the database's views and its View Browser.

Adding and Duplicating Records

You can add new records to a database at any time. In an unsorted view, any new or duplicate record will be inserted as the last record. In a sorted

view, any new or duplicate record will be inserted in the appropriate location in the sort.

Adding a New Record

Enter Access mode to enter new records into your database. One new record is automatically created when you create a new database.

There are three ways to add new blank records.

- Choose New Record (Command-n) from the Access menu.
- Press the New Record button in the Access controls

- Press Enter after entering data into a record. (This will create a new record only when Create New Record is checked in the "Enter Key Means" section of the Preferences panel.)

When you create a new record, your cursor will automatically be placed into the first field in the new record. Enter your data into your new record, navigating through the fields either by using the Tab key or by clicking in the fields. Also, the Return key will move your cursor to the next field in every field type but scrolling RTF fields. In scrolling RTF fields, the Return key adds another line to the field (see RTF Field below).

DataPhile saves your data automatically. If you enter data into a record and move to another record or create a new record, the data will be saved. If you've made changes that you don't want to save, choose Revert Record from the Edit menu (Command-u) before leaving the record.

You can explicitly save your data by clicking on the Save Record icon in the Access controls

or you can press the Enter key. Depending on what you have selected in your Preferences panel under "Enter Key Means...", the Enter key will either leave you in the same record or will save the data and create a new

record. If this action leaves you in your original record, choose New Record (Command-n) for each new record that you want to create.

If you have specified any default entries for a field (see Chapter 3), then those defaults will appear in any new record created after the default is specified.

Copying a Record

You can create a new record by duplicating an existing record. This is a quick way to create records with similar information.

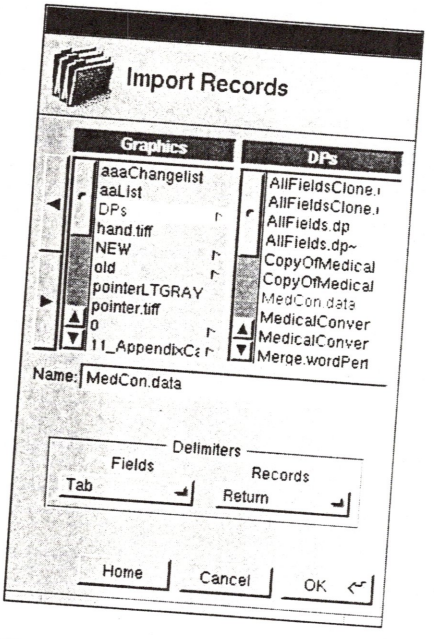
To duplicate a record, go to the record that you want to copy and choose Duplicate Record from the Edit menu. A duplicate record will be added as a new record at the end of your database. You can also copy the record into the Pasteboard by choosing Copy Record from the Edit menu (Command-C), and paste it into the database by choosing Paste Record from the Edit menu (Command-V).

You can also paste a record from one database into another if the two databases have matching field names. For example, if you have an invoice database and a clients database, you could create a new invoice record for a client by pasting the client record into the invoice database, assuming that the fields containing the data you want to transfer have the same names.

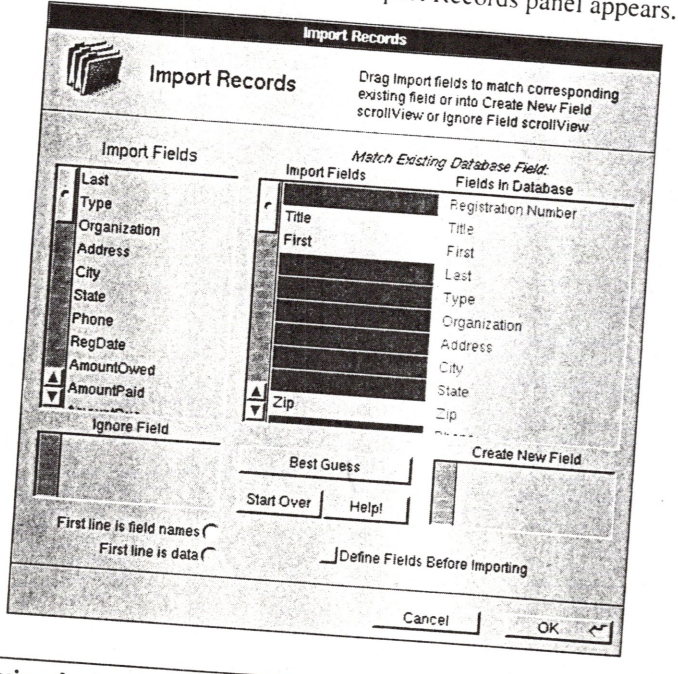
Importing Records

You can import a delimited text file into an existing database by choosing Import Records... from the File menu. You'll get the Import Records panel which lets you choose a text file and set the field and record delimiters

used by the file. (See Chapter 2 for more information on field and record delimiters.)



When you click OK, another Import Records panel appears.



This panel lets you match fields in the text file with fields in your database. **DataPhile** takes the first record of the text file and places the field information in the Import Fields scroll view. The information may be field names or it may be actual data. You can then drag the fields from the Import Fields scroll view to the matching field in the existing database. If there are fields in the imported text that don't match fields in your database, you can choose to ignore those fields by dragging them to the Ignore Fields scroll view. You can also choose to add fields to your database by dragging the fields from the Import Fields scroll view to the Create New Field scroll view.

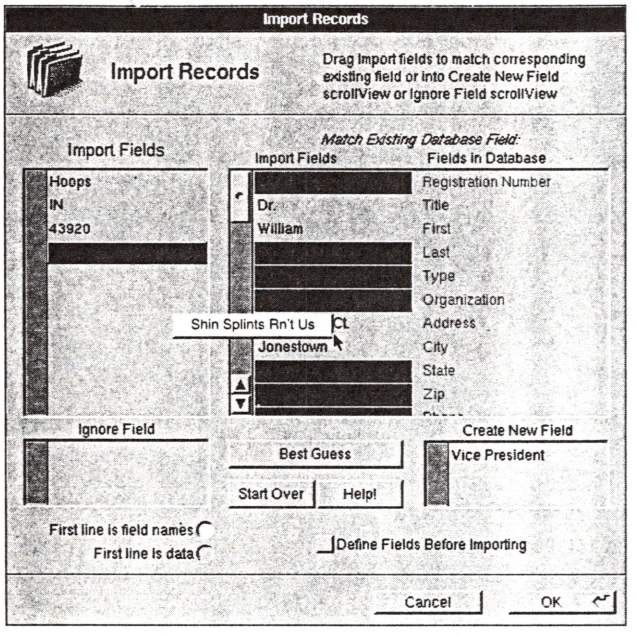
If the first line of your import file contains field names that match the field names in your database, you can choose Best Guess and **DataPhile** will match as many fields as it can. If you've made mistakes in dragging fields around, you can either drag them to their correct location, or press the Start Over button to move all fields back to their original location in the Import Fields scroll view. Once you're satisfied, press OK. If you've checked the Define Fields Before Importing checkbox, the Define panel will appear so that you can set the type and attributes of any newly-defined fields. Otherwise, the data will start importing immediately and the progress panel will indicate how many records have been imported.

For example, you have a text file that contains the following:

Dr. William Hoops 258 Basket Ct.
Jonestown IN 43920 Shin Splints Rn't Us, Inc.

Dr. Jacques Strappe 938 Rue de Madeleine
Paris France Medicin Sportif

Since the first line contains data, we select the First line is data radio button. Since the first line doesn't contain field names, we can't use the Best Guess button. Instead, we'll drag the fields from the Import Fields scroll view to the appropriate fields in the existing database.

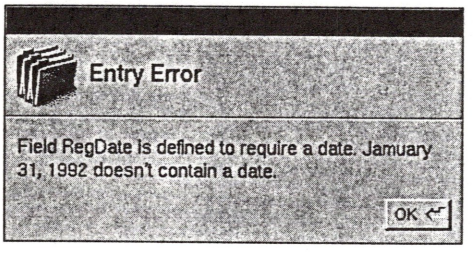


The Medical Convention database doesn't contain a field for the registrant's position at his or her organization, so we can either ignore that field or we can create a new field by dragging the field to the appropriate scroll view. If we create a new field, it will be named Vice President, because the first line of our data contained Vice President in that field. We can then click the Define Fields Before Importing checkbox to bring up the Define panel so that we can change the name of that field from Vice President to something more appropriate. We could also wait until we're done importing, since we can change field names at any time.

Entering Data

The different field types in **DataPhile** accept different kinds of data. Each field type is described below in terms of how to enter appropriate data into

it. If you enter data that **DataPhile** doesn't recognize as the appropriate type for the field, a warning panel will appear:



Text

Enter text into a Text field as you would enter text in any word processor (except that pressing the Return key in non-scrolling fields moves you to the next field). Use standard NeXT text editing techniques to edit the text. Remember that there can be only one font or text style in a regular Text field. If you want to mix fonts and/or styles, define your field as RTF. You can control whether the field is scrolling through the Text Field inspector in Design mode (see Text Field Inspector in Chapter 5). If you want to have multiple lines in non-scrolling Text fields, press Alternate Return at the end of a line. To view all the data in a non-scrolling Text field, use the arrow keys from the keyboard.

Using an Entry List

When you tab to or click on a field that has an entry list, the entry list will appear in a scroll view above or below the field. You can select an item in the list by clicking on it. If you double-click on an item, the item will be entered into the field and the cursor will advance to the next field.

You can also select an item by using the arrow keys. When the item you want is highlighted, press Tab or Return to enter the item and move to the next field.

If you type characters into the field, the first item on the list that matches the characters will be highlighted. If you press Escape, the highlighted item will be displayed in the field. If you press Return, the highlighted item will be entered into the field and the cursor will move to the next field. If you press Tab, only the characters you've actually typed will be entered.

RTF

Enter text into an RTF field as you would enter text in any word processor. Use standard NeXT text editing techniques to edit the text. In an RTF field you can mix fonts and/or styles and ruler settings. You can bring up a ruler for any active RTF field by choosing Show Ruler from the Align submenu of the Design menu (Command-R). This ruler works just as it would in any NeXT word processing program. You can control whether the field is scrolling through the RTF Field inspector in Design mode (see RTF Field inspector in Chapter 5).

Dates

Enter dates into a Date field using dashes (9-9-91), slashes (9/9/91) or periods (9.9.91) to separate the day, month and year. Or, you can type out the month (September 9, 1991). Regardless of how you enter the date, after you save the entry, it will be formatted according to the format chosen in the Date Field inspector (see Date Field Inspector in Chapter 5). The default display format for dates is September 9, 1991.

DataPhile provides some data entry shortcuts for dates. Enter a space or the word "today" for the current date. Enter the word "yesterday" or "tomorrow" for the appropriate dates. If you enter a month and day, **DataPhile** assumes the current year. If you enter a month and year, **DataPhile** assumes the last day of the month. If you enter just a month, **DataPhile** assumes the current year and the last day of the month.

Values

You can enter any alphanumeric characters into a Value field, but the field must contain some numerals. Regardless of how you enter the value, after you save the entry, it will be formatted according to the format chosen in the Value Field inspector (see Value Field Inspector in Chapter 5). The default display format for values is Unformatted. An unformatted Value field displays exactly what is entered.

Money

Enter values into a Money field using numbers. Regardless of how you enter the value, after you save the entry, it will be formatted according to

the format chosen in the Money Field inspector (see Money Field Inspector in Chapter 5). The default display format for money is Formatted with dollar sign ($), commas (,) for thousands and 2 decimal places.

Yes/No/Empty

Yes/No/Empty fields can be formatted as a checkbox or a text field. The formatting is set in the Yes/No/Empty Field inspector (see Chapter 5).

When a Yes/No/Empty field is formatted as a checkbox (default format), enter values into it by clicking on the field itself or by tabbing into the field and typing "Y" or "T" (yes/true), or "N" or "F" (no/false). You can also switch among the values with the space bar. Each click on the field or press on the space bar moves the value among true, false and empty.

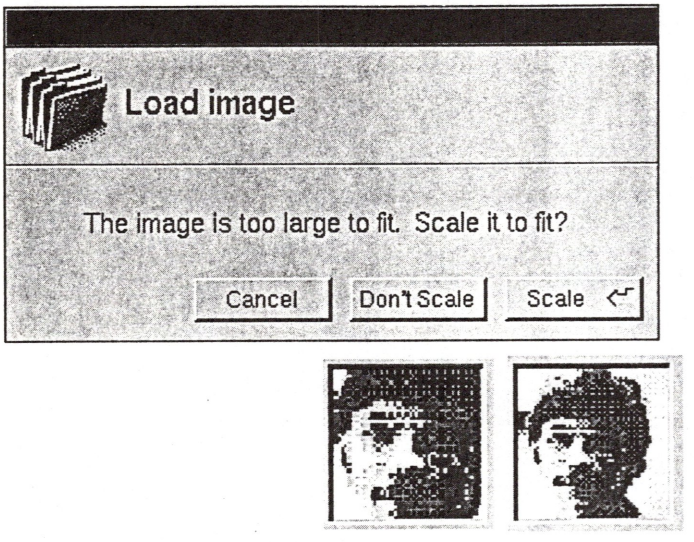
When the Yes/No/Empty field is formatted as a field, enter a "Y" or "T" (yes/true), "N" or "F" (no/false), or leave the field blank.

Picture

Enter graphics into a Picture field by dragging a TIFF, EPS, or Create document from the File Viewer into a picture field. Or, if the picture field is defined as "copied" (this is done through the Options panel in the Define panel), you can paste a graphic from the Pasteboard. See Chapter 3 for more explanation of linked and copied Picture fields. The color of the background and border of all Picture fields (linked and copied) is determined in the Picture Field inspector (see Picture Field Inspector in Chapter 5). The default display background for a picture field is light grey with a beveled background.

When you "drop" an image into a linked or copied Picture field and the image is larger than the field, the following dialog box will appear, unless

you've specified that images should be scaled or should not be scaled by default in the Preferences panel (see Chapter 9):



The Cancel button cancels the entry process.

Regardless of whether a picture is linked or copied, you can always move the picture around in the field by clicking on it and dragging, or by selecting the field and using the arrow keys on the keyboard. You can also resize an image by selecting it and dragging its handles. Remember that an image placed into a field that is defined as linked will reflect changes made to the original graphics file.

To remove an image from a Picture field, enter the field by clicking on it or using your Tab key to navigate to it, then press Cut or Delete (depending on whether you want the image stored in the Pasteboard for later use.) Or, you can drag or paste in a new image and overwrite the old one.

Sound

Enter a sound into a Sound field by dragging a .snd document from the File Viewer or a .vox file from a Mail window into the field. Or, if the Sound field is defined as "copied" (this is done through the Options window in the Define panel), you can paste a sound from the Pasteboard. First tab to the field, and then choose Paste from the Edit menu. See Chapter 3

for more explanation of the difference between linked and copied Sound fields.

The only formatting option you have for Sound fields is whether just the file name or the full path name of the sound document appears in the field in Access mode. This is controlled through the Sound Field inspector in Design mode (see Chapter 5 for more information).

To remove a sound from a Sound field, tab to the field, and press Delete. When you enter a new sound, it will replace the old one.

File

Enter documents, applications or directories into a File field by dragging any file (document, application or directory) from the File Viewer into the field. The only formatting option you have is whether just the filename or the full path name of the document appears in the field in Access mode. This is controlled through the File Field inspector in Design mode (see Chapter 5 for more information).

Updating Data

You can update information in existing records at any time. To do this, go to the record either by using the Access controls or by using the Find command (see below). Navigate through the fields by using the Tab button or by clicking in the field you want to modify. Changes to Text, RTF, Date, Value and Money fields can be made using standard NeXT text editing techniques. For more information on how to change data in the other field types, please see the appropriate field type under Entering Data above.

Viewing Data

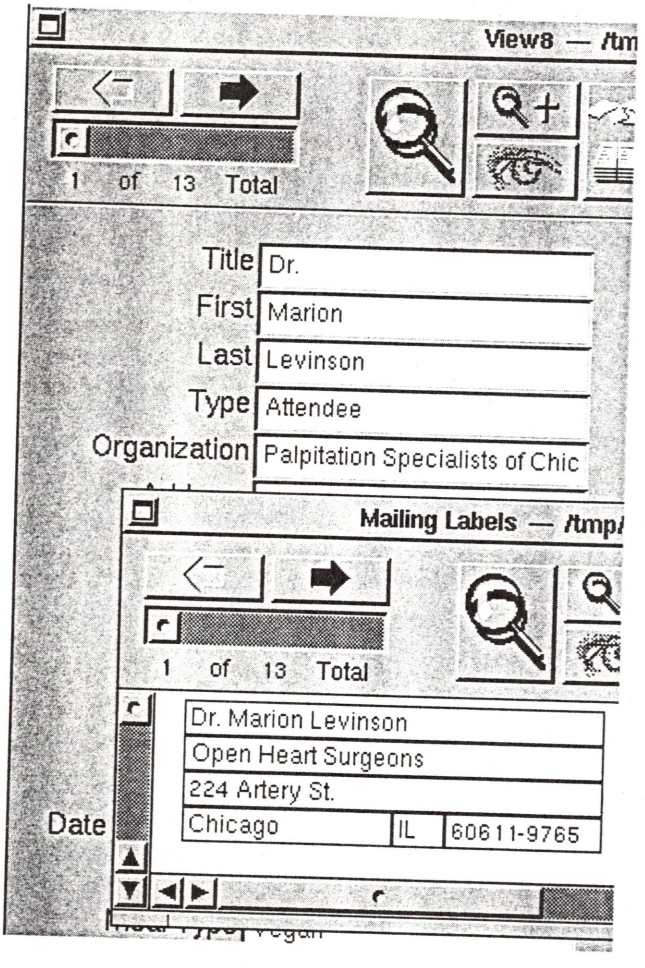
You can view your records in any of the views you've created. Each view contains an ordered set of records, which you can traverse using the Access controls (see below). You control which records are in the set through Find requests (see Finding Records below) and what order the records are in through Sort orders (see Sorting Records below). If you haven't specified a Find request, your view will include all the records you have entered. If you haven't specified a Sort order, the records in the view

will be in the order they were created. Different views can view different groups of records or they can all view the same group of records in the same or different sort orders. This gives you maximal flexibility to view your records in different ways.

For each view, you can page through your records one at a time (Show as Card) or scroll through them (Show as Report). Every view has a current record, which is the one being edited. In a Card view, the current record is the visible record. In a Report view, the current record may not be visible. If you click on a visible record, it becomes the current record.

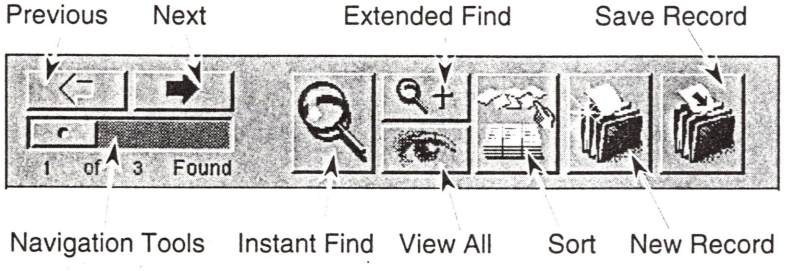
You can have the same current record in more than one view. If you make inconsistent changes to that record in different views, the changes in the view where the record is saved first will be recorded and the changes in the other view will be lost. For example, here are two views open to the same

record. In the Mailing Labels view, the Organization name has been changed "Open Heart Surgeons"



When the user saves the record in the Mailing Labels view, either directly or indirectly by moving to another record, the Organization field in View 8 will be updated to the new value.

Access Controls



You can move through your records using the Next and Previous arrows and scroll bar in the Access controls. The arrows move forward or backward one record at a time. If you want to go to a particular record in the sequence of records you're viewing, you can use the scroll bar or you can enter a number directly into the record number field under the Previous arrow. For example, if you want to go to the 50th record in the current sequence, double-click in the record number field, enter 50, and press the Return or Enter key.

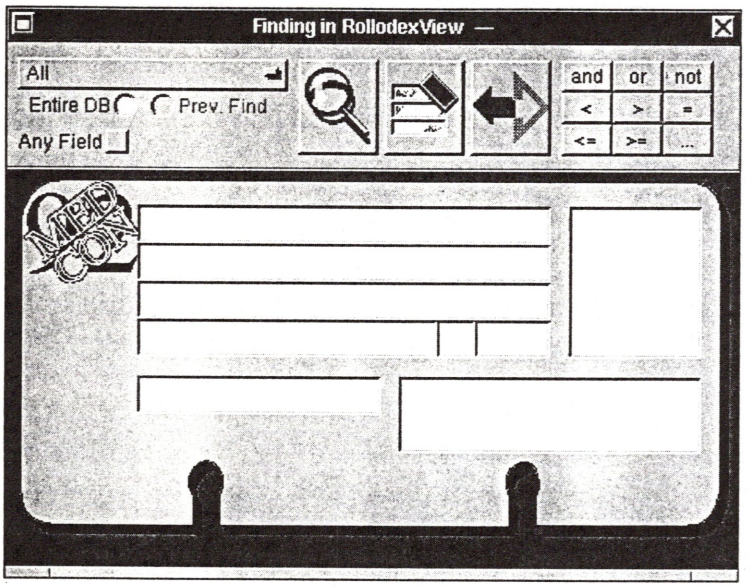
Hint: It's sometimes useful to be able to quickly scroll through your records looking at one particular field so you can get some idea of the contents of the record. To do this, create a Report view with the field you want to examine. You can scroll through this view very quickly, find a record of interest, and then choose Find Record in All Views from the Access menu (Command-j) to bring up the record in your other open views.

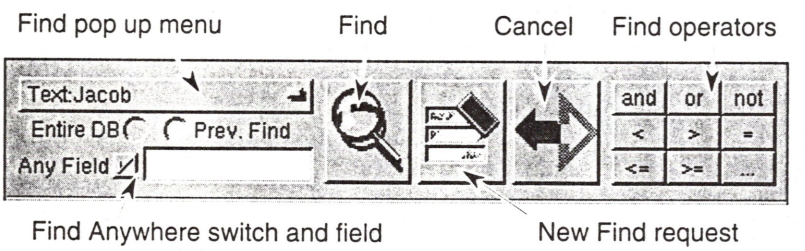
Finding Data

In Find mode you can select a subset of your records for viewing, updating, and reporting. To find records, you provide a description of what records you want in your found set by entering specifications into fields when your view is in Find mode. **DataPhile** then finds records that match your specifications. These records become the found set which you can then view in Access mode. For example, if you wanted to find conference attendees from the West Coast, you could enter the specification "CA or OR or WA" in a State field. This specification would match all records with "CA" or "OR" or "WA" in their State fields.

Creating a Find Request

Place your key view in Find mode by choosing Find from the Access menu (Command-f) or clicking on the small magnifying glass in the Access controls. Your view will contain the same fields with different controls at the top of the window.





Enter your search specifications into the fields. You can enter single words, multiple words, or more complex expressions. You can enter specifications in more than one field. The keypad in the Find controls allows you to enter find operators easily. If you have defined a field to use an entry list (see Chapter 3), the entry list will also appear when the view is in Find mode, allowing you to pick one of your specified entries.

Single words

When you enter a single word as a specification in a field, **DataPhile** will match all records that contain words in that field that are prefixed by that word in that field.

Examples:

"Ant" in a City field will find "Antwerp" and "San Antonio". It will not find "Grants" or "Santa"

"C" will find any records containing words in the City field that start with "c": "Cucamonga", "Santa Clara"

Multiple words

If you specify more that one word, a matching field must contain words prefixed by each word specified. All the words in the specification must be matched.

Example:

"An San" will find "Santa Ana" and "San Antonio" but not "Santa Clara" or "Antwerp"

Find Expressions

You can enter more complicated find specifications to get exactly the records you want. Find operators include relational operators (<, <=, >, >=, ...) and logical operators (and, or, not).

Relational Operators

These operators let you find records with fields with values that are less than or greater than a specified value.

Examples:

You have an amount value field in your database. You could enter the following specifications:

"< 100" would match all records where the amount field contains a value that is less than 100.

">= 500" would match all records where the amount field contains a value that is greater than or equal to 500.

"100 ... 500" would match all records where the amount field contains a value that is between 100 and 500 (including the values 100 and 500). This specification could also be written as ">= 100 and <= 500" (see Logical Operators below).

You have a date field in your database.

"< Jan 5, 1992" would match all records where the date is chronologically before January 5, 1992.

"> today" would match all records where the date is chronologically after today's date.

"1/1/92 ... 1/31/92" would match all records where the date is in January 1992. Notice that you can't just type in "January" or "January 1992" since those are not dates.

You have a Last Name text field in your database.

"> j" would find all last names that are alphabetically greater than J. This would include "James", since "ja" is greater than "j". "> jb" would not match "James" but would match "Johnson".

Text field specifications work on a per word basis, so "> j" would also match "St. James."

Logical operators

Logical operators allow you to combine expressions. For example, suppose you want to find both low and high values in an Amount field. You can find the low values with "< 100" and the high values with "> 500", but you want your found set to include both. You can specify "< 100 or > 500" to match records where the amount is either less than 100 or greater than 500.

AND

Expression1 *and* Expression2 specifies that the field must match both expressions. A multiple word specification like "James Chavez" is actually a short cut for "James and Chavez," since a matching field must contain words prefixed by both "James" and "Chavez".

Example:

In a text field:

"< c and > y" would match text fields that contain both a word starting with a or b and a word starting with y or z.

OR

Expression1 *or* Expression2 specifies that the field must match either Expression1 or Expression2. If either one is matched, the record will be included in the found set.

Examples:

In a Name text field:

"James or Jim" will match fields containing "James" or "Jim" or "Jimmy" or "Jameson"

In a date field:

"Jan 1, 1991 ... Dec 31, 1991 or 4/15/92" will match fields containing dates in 1991 or April 15, 1992.

"< yesterday or > today" will match fields containing dates chronologically less than yesterday's date or chronologically greater than tomorrow's date.

NOT

Not Expression will match fields that do not match Expression.

Examples:

In a Name text field:

"Not Smith" will match fields that do not contain words prefixed with "Smith".

In a date field:

"not today" will match fields with dates that are not whatever the current date is.

Compound Expressions

Logical operators work with expressions of any complexity so that you can specify what you want.

Examples:

In a text field, you want to find your friend, Jimmy Chavez, but you can't remember whether you entered his name as James or Jim or Jimmy. You could specify "Chavez" and then look through all the records with Chavez in the name field or you could specify exactly what you want:

> "(James or Jim) and Chavez" will match "James Chavez", "Jim Chavez", and "Chavez, Jimmy". It won't match "John Chavez". Note the use of parentheses to make your specification clear.

Multiple Field Specifications

When you enter specifications into more than one field, only records that match each specification will be included in the found set. For example, if you have a City field and a State field and you enter Las Vegas in the city field, you'll match records with addresses in both Las Vegas, Nevada and Las Vegas, New Mexico. If you only want records from Las Vegas, New Mexico, specify both the city and the state in the appropriate fields.

Special Features

Empty Fields: To find records with no value in a particular field, enter "=" in that field. To find records that have some value in a particular field, enter "not =".

Any Field: To find a word in any field, click on the Any Field button and enter the word into the text entry field. For example, you could find all records in which the word "NeXT" appears in any field or you could find all records in which the phrase "NeXT computers" appears in any field. Note that this feature is for words or phrases only; you can't use operators.

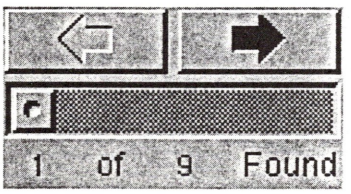
Specifying Which Records to Search

You can decide whether to match records in the entire database, or whether to only match records in the current found set. The current found set is the set of records that you were viewing when you put your key view into Find mode. Click on the Entire DB button if you wish to use the entire database. Click on the Prev. Find button if you wish to limit the search to records in the current found set.

Executing A Find Request

When you have completed your Find request, execute the request by choosing Find from the Access menu (Command-f) or clicking the magni-

fying glass button in the Find controls. **DataPhile** finds all records that match your specifications and returns your view to Access mode so that you can immediately browse those records. You can see how many records were found by checking the number of records below the scroll bar in the access controls.



If there are no records matching your specifications, **DataPhile** notifies you with an alert box and leaves the view in Find mode so that you can create another Find request.

Reviewing Find Requests

When you are viewing a found set, you can review that set's Find request by putting the view in Find mode. The fields will contain the specifications for the current Find request.

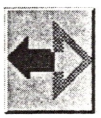
When the view is in Find mode, you can also review and re-execute other Find requests. The Find pop-up menu allows you to select any Find request that you've executed during the current **DataPhile** session and any Find request that you've saved during a previous **DataPhile** session (see Saving Find Requests below). The Find pop-up menu shows part of the specification in the first field specified, but you can rename a Find request when you save it (see below).

When you have selected a Find request from the pop-up menu, the specifications appear in the fields. If you choose Find from the Access menu (Command-f) or click on the magnifying glass button, the found set represented by that Find request will become the current found set and the view will be returned to Access mode.

If you modify the specifications in a Find request selected from the pop-up menu, a new Find request will be created with the modified specifications. You can then execute the new Find request as described above.

Returning to Access Mode

You can return to Access Mode by executing a Find request. If you wish to return to Access mode without executing a Find request, click on the Cancel button in the Find controls.



Saving and Deleting Find Requests

Find requests are retained during your current **DataPhile** session. When you quit **DataPhile**, the Find requests are not retained unless you specifically save them. To save a Find request, choose Save Find... from the Access menu. This will bring up a Save Find panel with a list of your currently saved Find requests.

The name of the current Find request appears in the Title text entry field. If you haven't already named the Find request, its default name consists of the name and some of the specification of the first field specified. You can rename the Find request by typing in the Title text entry field.

You can save the Find request for the current found set of records from Access mode. When your view is in Find mode, you can save any Find request. Load the Find request from the Find pop-up menu and then choose Save Find... from the Access menu.

Once you have saved a Find request, its title will always appear in the Find pop-up menu until you delete it. To delete a Find request, place your view in Find mode, choose the Find request you want to delete from the Find pop-up menu and select Delete Find from the Access menu. You can delete saved or unsaved Find requests.

During the course of a lengthy session using **DataPhile**, you may accumulate a lot of Find requests and you may find that your Find pop-up menu has become unwieldy. To delete all unsaved Find requests, choose Clear Unsaved Finds from the Access menu.

When you delete a Find Request that is being used in a view, the view will be returned to viewing all records.

Viewing All Records

When you're viewing a found set in Access mode and you want to view all of your records, click on the View All button in the Access controls or select View All Records (Command-A) from the Access menu.

When your view is in Find mode, you can clear the current Find request by clicking on the Clear button. You can also choose All from the Find pop-up menu or choose View All Records (Command-A) from the Access menu. A blank Find request matches all records; just click on the magnifying glass button in the Find controls or choose Find from the Access menu (Command-f) to return to viewing all records.

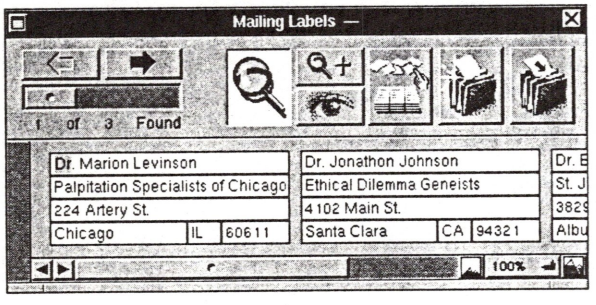
Specifying if the Field Isn't in the Current View

You may want to view information based on a specification in a field that you don't want to view. For example, you might want to view the names and addresses of all contacts made since the first of the year. To do this, you need two views: one with the name and address fields and one which includes the contact date field. Put the view with the contact date field in Find mode, enter the specification ">= 1/1/92" into the date field, and execute the Find request. Now you have two options. If both views are currently open, you can choose Find Record In All Views from the Access menu. All open views will now be using the found set from the key view. Or you can make the name and address view key and put it into Find mode. Choose the appropriate Find request from the Find pop-up menu

and click on the magnifying glass button. The name and address view will now be viewing the found set based on the contact date field.

Find From Selection

DataPhile provides a convenient shortcut for specifying simple Find requests when your view is in Access mode. Select a word or phrase and choose Find From Selection from the Access menu (Command-e). **DataPhile** will treat your selection as a Find specification for that field and will immediately execute that Find request.

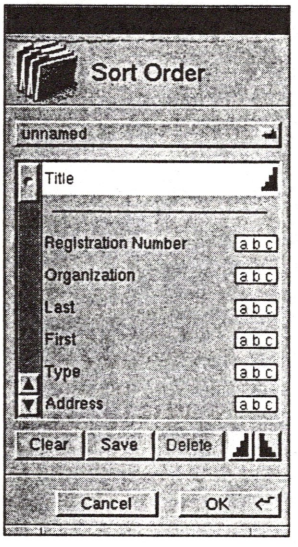


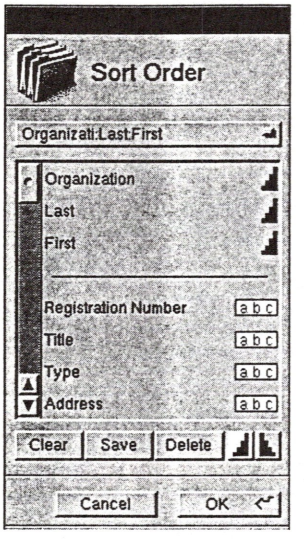
For example, you might be viewing a record and you want to see all of the Drs in the Medical Convention database. Select Dr in the Title field, hit Command-e (or press the large magnifying glass), and your view will be using a found set based on a specification of "Dr" in the Title field. This Find request will appear in the Find pop-up when your view is in Find mode; you can save it, delete it or modify it.

A Find request created in this way will always use the entire database even if you're currently viewing a found set.

Sorting Data

Records can be sorted by any of the fields in the database, including fields that do not appear in the key view. To sort records, choose Sort from the Access menu (Command-O) or click on the Sort button in the Access controls. This brings up the Sort Order panel which shows all the fields in the database.





To create a Sort order, you specify which fields you want to sort by and whether you want the sort on that field to be ascending or descending. To specify a sort field, drag that field over the line in the Sort Order panel. To specify whether the field should be sorted in ascending or descending order, select the field (it will be highlighted) and click on the ascending or descending button.

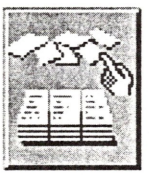
In the example above on the left, the records will be sorted by the Title field in ascending order. If two records have the same contents in the Title field, the order will be determined by which record was created first.

You can create multi-level sorts by specifying more than one sort field. Drag as many fields as you want above the line and drag them into whatever order you want. The records will be sorted by the first field. If there are duplicate values in the first field, those records will be ordered by the second field.

In the example above on the right, the records will be sorted first by Organization in ascending order. Records with the same organization will be sorted by Last name. Finally, if two attendees have come from the same organization and have the same last name, they will be ordered by their first name.

As you create your Sort order, **DataPhile** checks to see if you've already created that particular specification. If you have, its name appears as the Sort pop-up menu's title. If you haven't, the title is "unnamed".

When you're satisfied with your Sort order, you can execute it by clicking on the OK button. The records in the key view will be sorted according to the order specified. You can tell that you are viewing sorted records by looking at the Sort button in the Access controls.

Unsorted:  Sorted:

If you want to apply the same Sort order to the records in another view, make that view the key view and bring up the Sort Order panel. The Sort pop-up menu will contain all the Sort orders that have been created in the current **DataPhile** session or saved from previous **DataPhile** sessions (see Saving and Deleting Sort Orders below). It will also contain Sort orders that are automatically generated when a field is indexed (see Indexing Fields in Chapter 3). Choose the Sort order you want and the fields used in the specification will be moved above the sort line. Click on the OK button and the Sort order will be applied to the records in the key view.

Saving and Deleting Sort Orders

Sort orders are retained during your current **DataPhile** session. When you quit **DataPhile**, the Sort orders are not retained unless you specifically save them. To save a Sort order, choose Save Sort... from the Access menu. This will bring up a Save Sort panel with a list of your currently saved Sort orders. The name of the current Sort order appears in the Title text entry field. If you haven't already named the Sort order, its default name consists of the names of the fields in the specification. You can rename the Sort order by typing in the Title text entry field.

You can save the Sort order for the current view from Access mode. When you have brought up the Sort Order panel, you can save any Sort order. Load the Sort order from the Sort pop-up menu and then click on the Save button.

Once you have saved a Sort order, its title will always appear in the Sort pop-up menu unless you delete it. To delete a Sort order, bring up the Sort

Order panel, choose the Sort order you want to delete from the Sort pop-up menu and click the Delete button. You can delete saved or unsaved Sort orders. You cannot delete the Sort orders automatically generated for indexed fields.

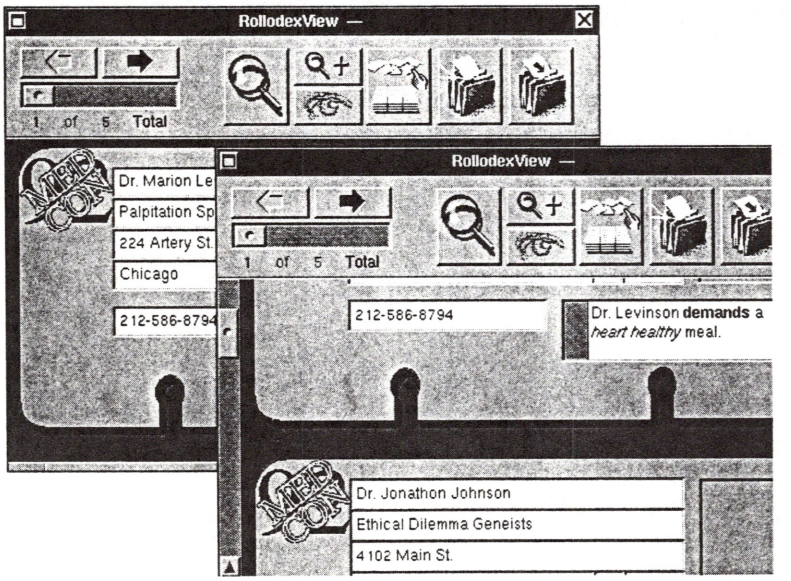
If you delete a Sort order that is being used by any views, the records in those views will be unsorted.

The Sort order that is applied to a view will be automatically saved when the view is closed and will be automatically applied to that view when the view is reopened. Thus, if you view your records sorted by Last Name in a particular view, the next time you open that view, the records will be sorted by Last Name. However, if you delete the Sort order after you have closed the view, the view will open with the records in unsorted order.

Advanced Access Features

Viewing Multiple Records

To view more than one record at the same time, choose Show as Report from the Tools menu. (This menu item toggles between Show as Report and Show as Card.). When a view is being shown as a list, you have the option of viewing as many records as your view layout and size allows.



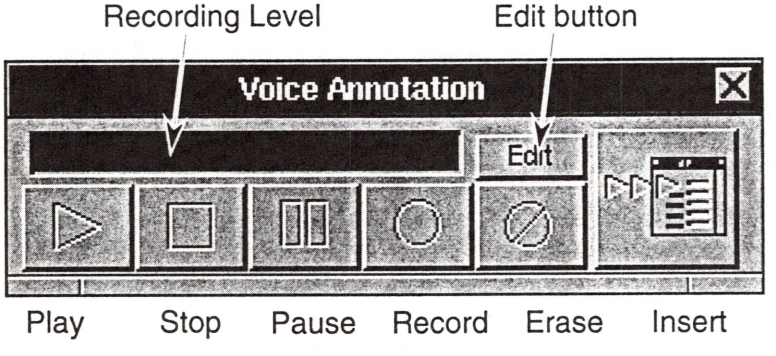
To view more records vertically, resize the view vertically by dragging down on the resize bar. You can also view multiple records horizontally (like with 3 up labels) by entering Design mode and resizing the body box until more than one record appears across the view (see Chapter 4 for more information on report views).

Tab Order

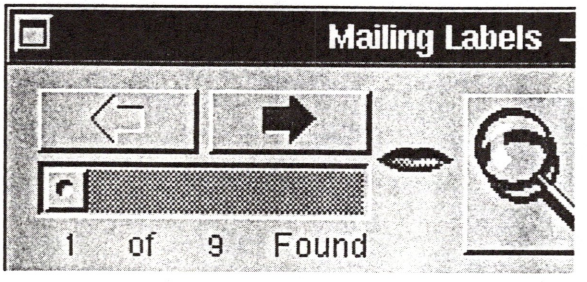
Tab order in a view is established in Design mode by grouping fields. For more information on how to set a Tab order, please see Tab Order in Chapter 5.

Voice Annotation

You can add a Voice Annotation to any record. While accessing the record to which you want to add Voice Annotation, choose Voice... from the Tools menu. The following Voice Annotation panel will appear.

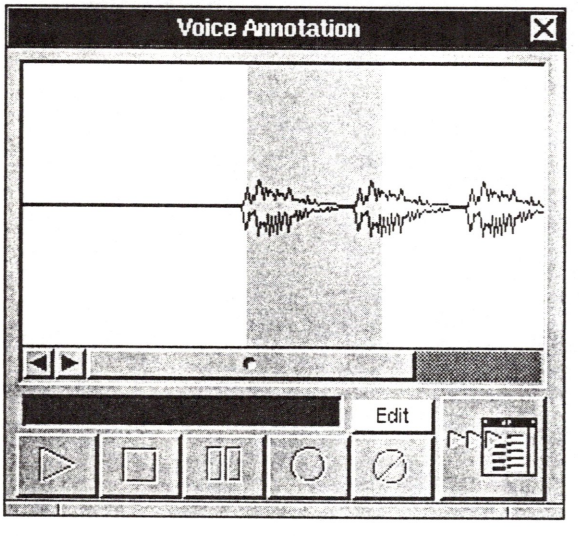


To add the recorded annotation to the record, press on the Insert button. A Lips icon will be inserted into the Access controls.



To play the Annotation, click on the Lips.

To edit a Voice annotation, either record another annotation, or click on the Edit button and use standard NeXT sound editing techniques to edit the sound.



Hint: Command-clicking on the lips icon brings up the voice editing panel.

To remove a Voice Annotation from a record, click on the Erase Sound button in the Voice Annotation panel.

Chapter 7
Labels and Envelopes

DataPhile allows you unprecedented ease in creating custom Label and Envelope reports though its unique Label and Envelope report generators. These report generators allow you to create as many custom Label and Envelope templates of any size as you like that include background graphics and text. The data that is included in these reports is determined by what data is included in the view that is key at the time of the reports selection. The key view can be either a Card or Report view.

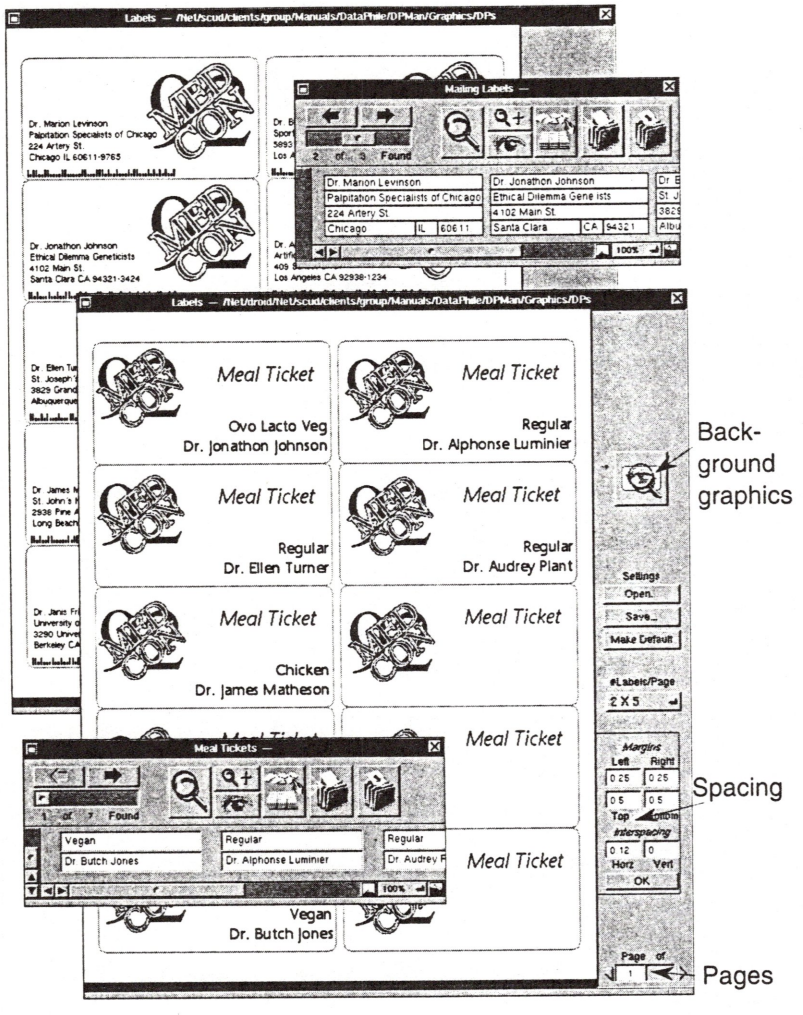
This chapter discusses how to use these report generators to quickly create, modify and print labels and envelopes. It also includes a step-by-step tutorial for using each of the report generators.

Label Report Generator

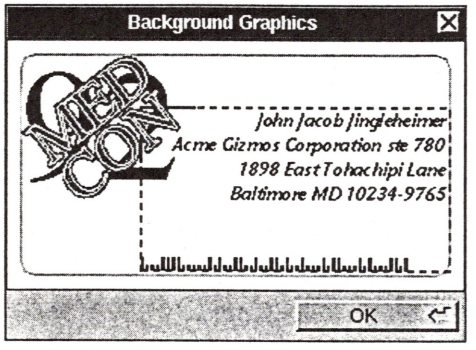
One of the most commonly requested reports in a database is a Label report. **DataPhile** can generate labels for your entire database, or just for a found set, in any number of predefined or custom label formats.

The Label report generator is launched using the New Labels command from the Reports menu. The order and placement of the text for each label is determined by the field order and placement in the key view. The labels

will be created from the records in the found set of the key view and will be ordered by the Sort order in the key view.



Adding Background Graphics and Text



Use the Background Graphics button to get a close-up view of the template used for the individual labels in the key Label report. You can have a number of different saved Label reports with different background objects (see Settings below).

You can move the data within the template by dragging it and resizing the text box. You can also change the text's font by selecting the text object and using the font panel to choose a new font.

You can use this template to add and delete background graphics and/or text. To add a graphic or text object to the template, use normal graphic editing techniques (see Chapter 5). You can drag in TIFF or EPS files, paste graphics from other programs, and use the Tool palette to create simple graphics. To delete a graphic or text object, select the object and use Cut or Delete.

Editing Individual Labels

You can also edit each label in the report individually. You can move or resize the box containing the data using standard moving and resizing techniques. You can also paste graphics into the report, resize them, and move them so that they cover just one label or many labels at a time.

Saving and Loading Label Reports

Use the Settings buttons to save and load existing Label reports. Saved Label reports are stored in a .DataPhile directory in your Home directory. They can be used with any database.

Open...

Brings up an open panel which allows you to open a previously saved Label report from the .DataPhile directory.

Save...

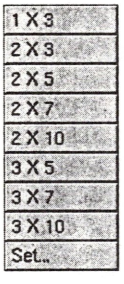
Saves a current Label report for later use. If you want this Label report to be the default report, then leave the default name of LabelDefaults.dpLabels. Otherwise, give it another name.

Make Default

Saves the current Label report as the default Label format (LabelDefaults.dpLabels in the ~/.DataPhile directory).

#Labels/Page

Use this pop-up menu to set the number of labels on your page. The first number represents the number of labels across the page and the second represents how many labels will be placed down the page. If you want to specify a custom configuration, choose Set.



Margins

Use these Text entry boxes to set Left, Right and Bottom margins as well as the space between labels (interspacing). Press the OK button for any changes to apply.

Viewing Different Pages

Use the Page Of arrows to view different pages in the Label report. To go directly to a page, double click on the page number on the left side, enter the page number, and press Return.

Adding Labels to a Label Report

You can add a found set of records to a Label report after the initial creation of the report using the Add Labels item of the Reports menu. To add records, create a found set of the records you want to add to the Label report and choose Add Labels from the Reports menu.

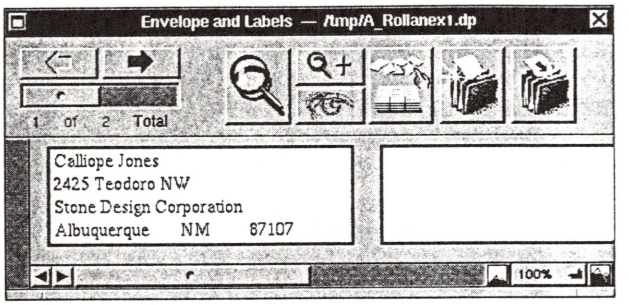
Making Mailing Labels-Tutorial

This tutorial provides you with step by step instructions for creating mailing labels. The steps and concepts presented here can be applied to any other size labels as well. This tutorial assumes that you are familiar with the concepts of loading views, adding, sorting and selecting records. See Chapter 6 for information on adding, sorting and selecting records and choosing views.

1. Choose A_Rollanex from the Templates submenu of the Database menu. Add at least 10 records to the database in the Rolly view. Since the way the data will appear in each label is determined by the view which is key at the time you choose New Labels from the Reports menu, you need to use a view which includes all the information (formatted correctly) that you would like in a mailer label.

   The A_Rollanex database includes an Envelopes and Labels view designed specifically for use in the labels and envelope reports. Load

the Envelopes and Label view from the View Browser.



2. Choose New Labels from the Reports menu. Labels will be automatically generated for all the records that are currently found in the key view. The labels will be placed into the default Label report. This default report is for labels that are three across and 10 down. Other label formats can be chosen from the Labels/Page pop-up menu. **DataPhile** will automatically reposition your data in the middle of each label.

3. If you would like to re-position the records within their labels or would like to add a graphic to the label, click on the Background Graphics button

To reposition the text within the label, select the data box, drag it to the desired position. Use normal graphic editing technique to add and modify background graphics. When you're done editing the label background, press OK.

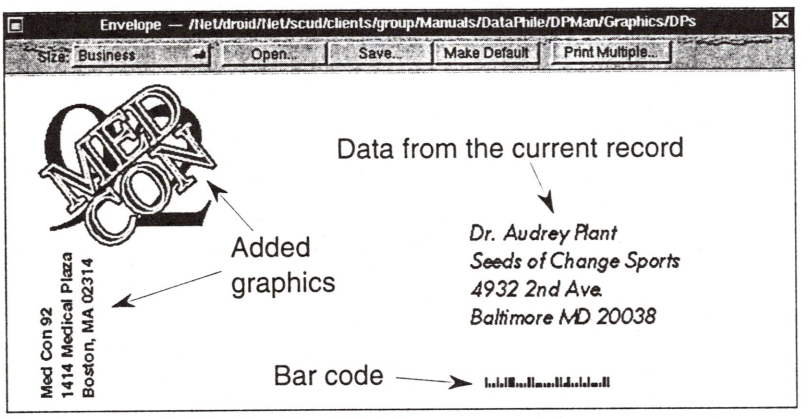
4. If you have more than one page of labels, click on the Page arrows at the bottom right side of the report to preview the pages. When you are satisfied with the data positioning, choose Print from the DataPhile menu.

Envelope Report Generator

The Envelope... command from the Reports menu automatically places the current record into a special Envelope report. You can also add graphics and other text objects (return addresses, messages, etc.) onto any Envelope report. The contents and position of the text on the envelope will be deter-

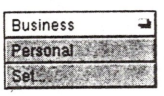
mined by the fields and field position of the key view. If you print multiple envelopes (see below), the records and ordering will be determined by the found set and sort order of the key view.

When you bring up the Envelope report, the current record will appear in your default report (see below). However, you can print envelopes for all the records in your found set by clicking the Print Multiple... button.



Envelope Size

Use the Size pop-up menu to choose a default business (9 1/2"x 4") or personal (7 1/2" x 3 3/4") size for your envelope or use the Set command to set a custom width and height. The units of measurement in the dialog box that appears will be determined by your default Ruler units as set in the Preferences panel.



Saving and Loading Envelope Reports

Use the following buttons to save and load existing Envelope reports. Saved Envelope reports are stored in the .DataPhile directory in your home directory. They can be used with any database, so you can design standard envelopes that can be addressed from more than one database.

Open...

Brings up an Open Envelope panel which allows you to open a previously saved Envelope report from the .DataPhile directory.

Save...

Saves the current Envelope report format for later use. If you want this Envelope report to be the default report, then accept the default name of EnvelopeDefaults.envelope. Otherwise, give it another name.

Make Default

Saves the current Envelope report as the default Envelope report (EnvelopeDefaults.envelope) in the .DataPhile directory.

Printing Single Envelopes

Choose Print from the DataPhile menu to print the envelope that appears in the Envelope report.

Printing Multiple Envelopes

Click on the Print Multiple... button to print an envelope for each record in the Found set of the view that was key when Envelope was selected from the Reports menu. The envelopes will be printed in the key view's Sort order.

Adding Background Graphics and Text

You can add and modify background graphics and text using standard graphic editing techniques (see Chapter 5). You can move and resize the text object containing the record's data and you can set its font with the font panel. You can then save Envelope reports with background text and graphics for future use using the Save, Open and Make Default buttons.

Making Envelopes-Tutorial

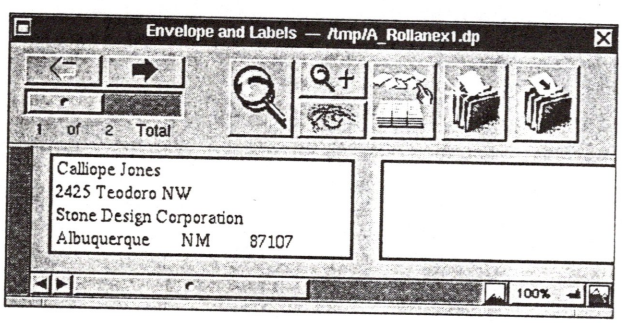
This tutorial provides you with step by step instructions for creating and printing a business sized envelope. The steps and concepts presented here can be applied to any other size envelope as well. This tutorial assumes

that you are familiar with the concepts of loading views, adding, sorting and selecting records. See Chapter 6 for information on adding, sorting and selecting records and choosing views.

1. Choose A_Rollanex from the Templates submenu of the Database menu. Add a record with the name and address of somebody you owe a letter. Save the record.

   Since the way the data will appear within the envelope is determined by the view which is key at the time you choose Envelope from the Reports menu, you need to use a view which includes and formats the information you would want on your envelope.

   The A_Rollanex database includes an Envelopes and Labels view designed specifically for use in the label and envelope reports. Load the Envelopes and Label view from the View Browser and go to the record that you just added.



2. Choose Envelope from the Reports menu. An envelope will be automatically generated containing with the record currently found in the key view. The record will be placed into the default Envelope report. This default report is for a business sized envelope. Other envelope sizes can be chosen from the Size pop-up menu. **DataPhile** will automatically reposition your data in the middle of the envelope in this report.

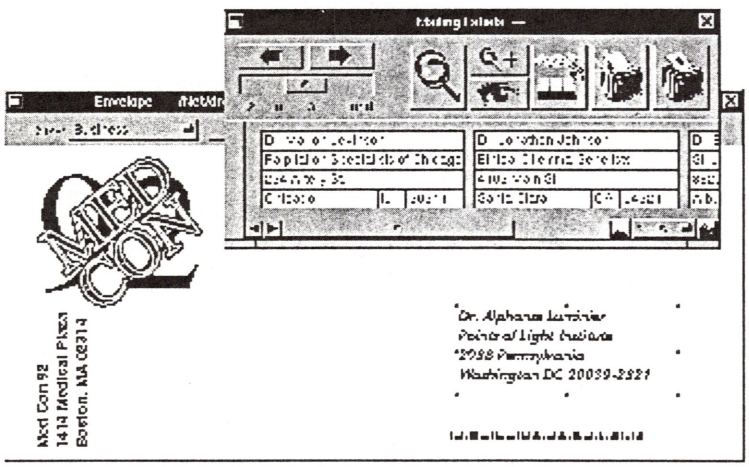
3. If you would like to reposition the data within the envelope, drag the data to a new location. You can add and modify graphics and text using **DataPhile**'s standard graphic editing techniques (see Chapter 5).

4. If you have more than one record in the found set in the view that was key at the time that you chose Envelope from the reports menu, you can print envelopes for all of the found set by choosing Print Multiple. If you choose Print, just the record that appears in the Envelope report will

be printed. If you are hand feeding your envelope(s), be sure to choose Manual Feed in the Print dialog box that appears.

Bar Codes

If you want, you can have **DataPhile** automatically create bar codes for your labels and envelopes. These bar codes, which conform to the 52-bit POSTNET bar code of US Postal Service, can help your mail arrive up to two days faster. To add bar codes to your labels and envelopes, check Use bar codes on labels & envelopes in the Preferences panel. To generate bar codes, **DataPhile** looks at the last word in the text generated from the record. If that word looks like a 5- or 9-digit zip code, **DataPhile** will create a bar code.



Chapter 8
Exchanging Data with Other Applications

DataPhile allows you to exchange data with a number of different applications. You can import data from text files to create new records or new databases. You can also export data to text files for backup or use in another database or other application that can import text, to a text file for merge into word processing documents or directly to a Lotus Improv spreadsheet document. Chapter 2 describes how to import data from a text file to form a new database and Chapter 6 describes how to import data from a text file to create new records. This chapter discusses importing data for new records or new databases from text files using the Services menu and also how to export your data for use in other databases, spreadsheets or word processing programs.

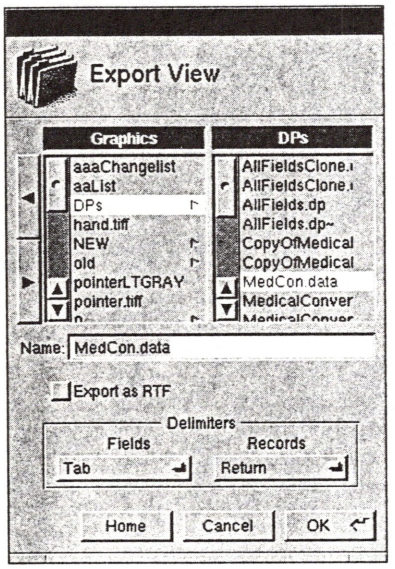
Exporting Records To a Text File

There are a number of reasons why you would export data from a database into a text file. First, exporting your entire database to a text file is an excellent way of backing up your data. Data that has been exported to a text file can be imported back into **DataPhile** or any other database. For more information on how to export records to a backup file, please see Chapter 2.

Sometimes however, you may want to export only some of the fields in some of the records. This might be to create another database, transfer the information to another program (including another database) or to back up a subset of your data.

If you want to export a subset of your data for any of these reasons, use the Export Records in View command in the Reports menu. This menu item will take the data in the fields and records that appear in your key view (it can be a Card or Report view) and put that data into a delimited text file.

When you choose Export Records in View, an Export View panel will appear which allows you to name and set the delimiters of the export file.



Enter the name of the text file you want to create in the Name text entry box.

Export as RTF:

Click on this box when you want your text to be exported as RTF (Rich Text Format). You would use RTF format when you want the font size and style information for each field exported along with the text.

Delimiters:

Use these pop-up menus to set the delimiters for fields and records of the text file you are creating. Delimiters are the keyboard characters used to separate fields and records in a text file. For example, if the field delimiters are Tabs and the record delimiters are Returns, then in your text file individual fields will be separated by Tabs, and records will be separated by Returns. For data to be exported for use in Macintosh databases which use a Return for the record delimiter, choose Macintosh from the Record delimiter pop-up menu. For more information on setting and using delimiters, please see Chapter 2.

Results:

The first line of the exported data will consist of the field labels of the fields that are in the view. Note that the labels may not be the same as the field names. Following the first line, the data for each field that appears in the current key view, for each record in the found set of the current view,

in the order determined by current view's Sort order will appear. The information will be formatted as specified for the current view; for example, dates will be exported in whatever format was selected in the Date Inspector. If Export as RTF was selected, the font information will also be exported.

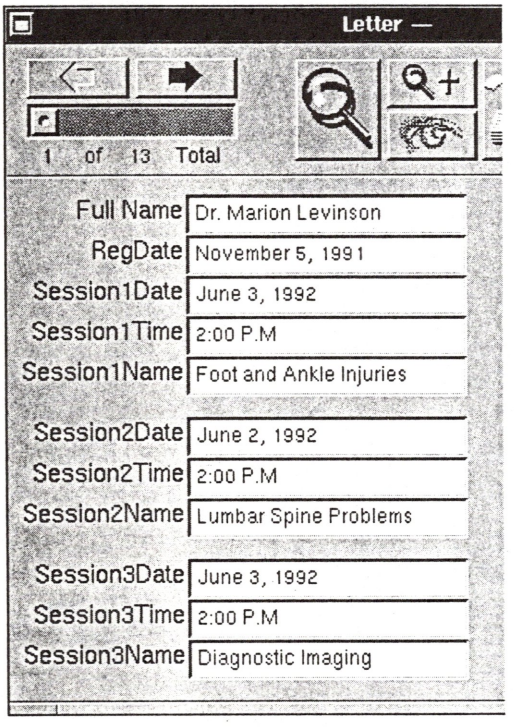
Exporting To Merge File

When you want data to be placed in a merge file for merging into a word processing document, export your data by choosing Export to Merge File from the Reports menu. The Export Records to Merge panel will appear (see below).

Name and locate the export merge data document you are creating. If you plan to use the merge data document with WriteNow or WordPerfect, click on one of those options. Otherwise, click on Specify Below and set delimiters appropriate for the application that will use the data.

For example, with our sample medical conference registration database, you may want to find all registered speakers and send them a letter of confirmation in WriteNow or WordPerfect. To do this, you would first create a view with just the fields that contain information you plan to have appear in the letter. In our letter, we want to include the speaker's full name, date

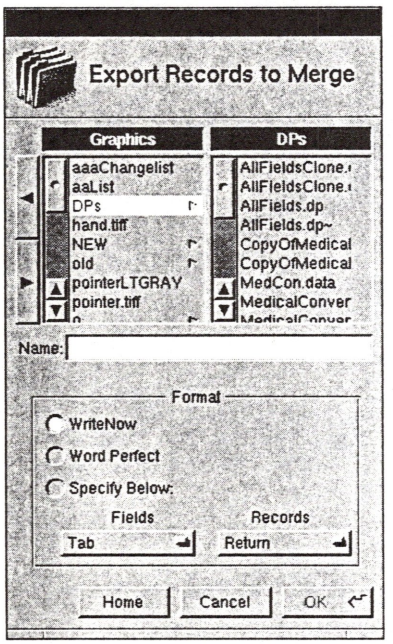
of registration, and names, dates and times of their scheduled presentations.



These fields can be arranged in any order, but should be formatted according to how you want the data to appear in the word processing document.

Choose Export Records in View, then name and locate the export file in the same folder as you will create the WriteNow or WordPerfect template document. Click on WriteNow or WordPerfect under Format. Since you

have specified that the records be exported into a specific format, you do not need to set the Field and Record delimiters.



Press OK to create the merge document. Then create your template document in the same folder as the merge document.

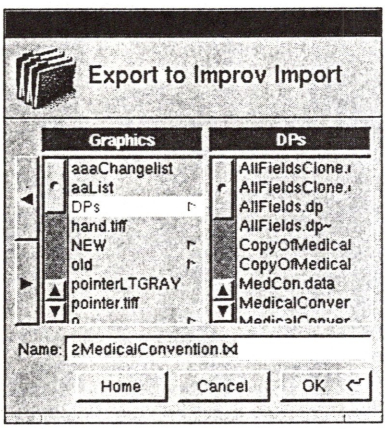
For more information on how to creating merge documents in and merge into WriteNow, please refer to Chapter 2 of your NeXT Applications Manual or to the new AppSoft WriteNow documentation.

For more information on how to create merge documents in and merge into WordPerfect, please refer to Merge in the WordPerfect Workbook for NeXT Computers.

Exporting to Improv

When you want to export data to be used in Lotus Improv, choose or create a view that contains only the data you want to export to Improv and export

your data using Export to Improv Import command from the Reports menu. The following Export to Improv Import panel will appear.

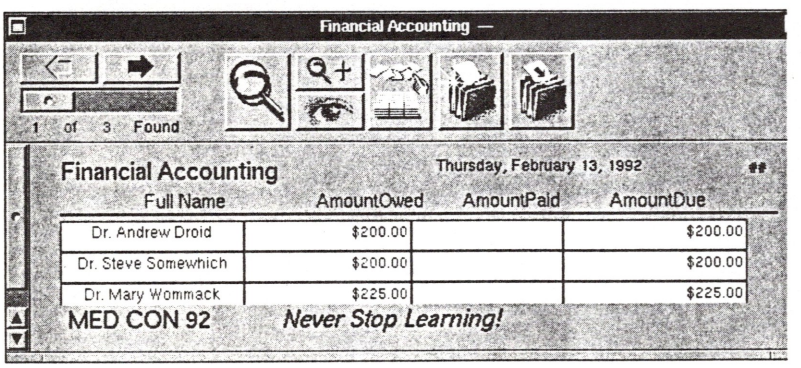


Name and locate the export data document you are creating. The data will be put into a text (.txt) file that can be imported into Lotus Improv using its Open command.

One of the most common uses of exchanging data between Improv and **DataPhile** is exporting data from **DataPhile** to Improv for summation in Improv.

For example, in our conference registration database, we might want to get a list of all the people who owe us money for the conference and get a total amount that is owed us.

To do this, we would create a view in **DataPhile** with just the information we might want in an Improv report, such as name, amount owed, amount paid and amount due.



Then, create and execute a Find request for all those registrants who have greater than 0 in their Amount Owed field (see Chapter 6 if you do not know how to execute Find requests).

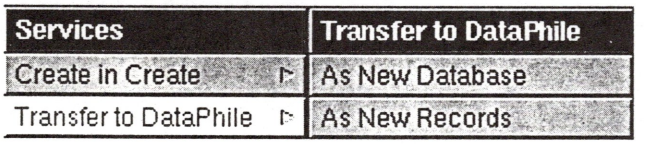
Choose Export To Improv Import from the Reports menu. Name and locate your text file. Launch Lotus Improv and open the text file using the Open command in Improv.

You can then use the totalling functions in Improv to get a sum total of all the money that is owed you for registration from this conference.

For more information on importing text data into Improv, please refer to the Lotus Improv Handbook.

Using DataPhile from Other Applications

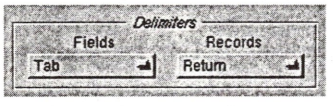
You can access **DataPhile** from other applications through the Services menu. Once you've installed **DataPhile**, other applications' Services menu will contain a Transfer to DataPhile submenu. This submenu will contain two choices:



The choices will only be available when text is selected in the application. For text to be successfully transferred to **DataPhile** as a new record or a new database, it must have consistent delimiters between data for fields and between records.

To transfer text as new records, you must first have **DataPhile** running with an open database. Then, select the data you want transferred to **DataPhile**, and click on As New Records in the Transfer to DataPhile menu. An Import Records panel will appear asking you to specify the field and record delimiters. If your text contains delimiters that do not appear in the field or record delimiter pop-up menus, you can specify custom delimiters by clicking on the Set button. For more information on importing records into a database, see Chapter 6.

To make a new database from selected text, **DataPhile** does not have to be running. Again, just select the text containing the data you want transferred to **DataPhile** and click on As New Database from the Transfer to DataPhile menu.The first line of your text should contain field names. If it doesn't, you may want to create a new database first and then transfer the text as new records (see above). For more information about creating a new database from text, see Chapter 2. If your text contains delimiters that do not appear in the field or record delimiter pop-up menus, you can specify custom delimiters by clicking on the Set button.



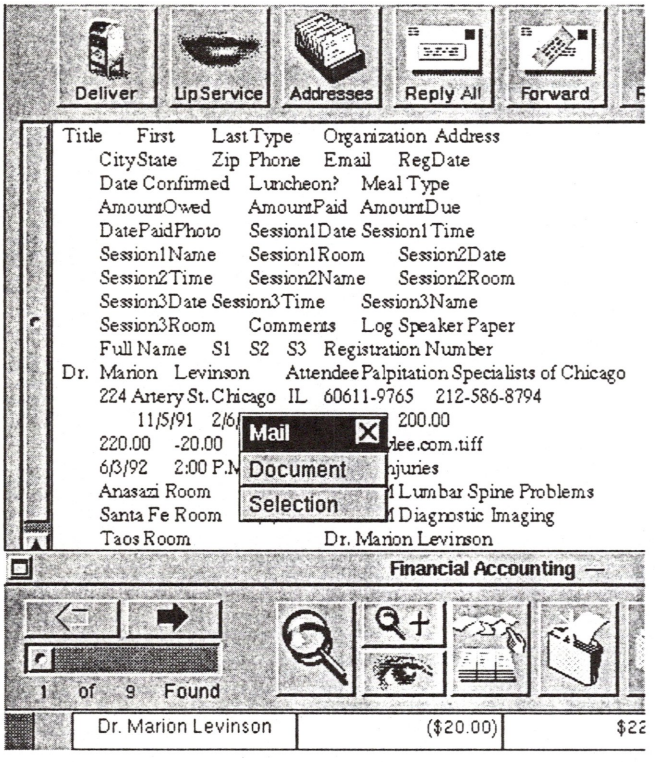
Using Mail to Transfer Records Between Databases

You can also use the Services menu to exchange data between **DataPhile** databases. In this way, even though more than one user cannot write to the same database at once, the users who are using a copy of the database can send any new records they add to the original user who can then easily add them to the original database.

Records can be transferred between databases in this way only if the databases share a structure. So, it should really only be done by someone who is the second, third, fourth (etc.) person to open a database who wants to send additions to the person who is using the original file. Remember that the second and subsequent persons who open a **DataPhile** database will get a copy of the original database (for more information on what happens when more than one person attempt to use the same database, see Chapter 2).

To send a record to another user, make sure that no text in your record is selected. Then choose Selection from the Mail submenu of the Services menu. This outputs the entire record (including the field names) to a mail

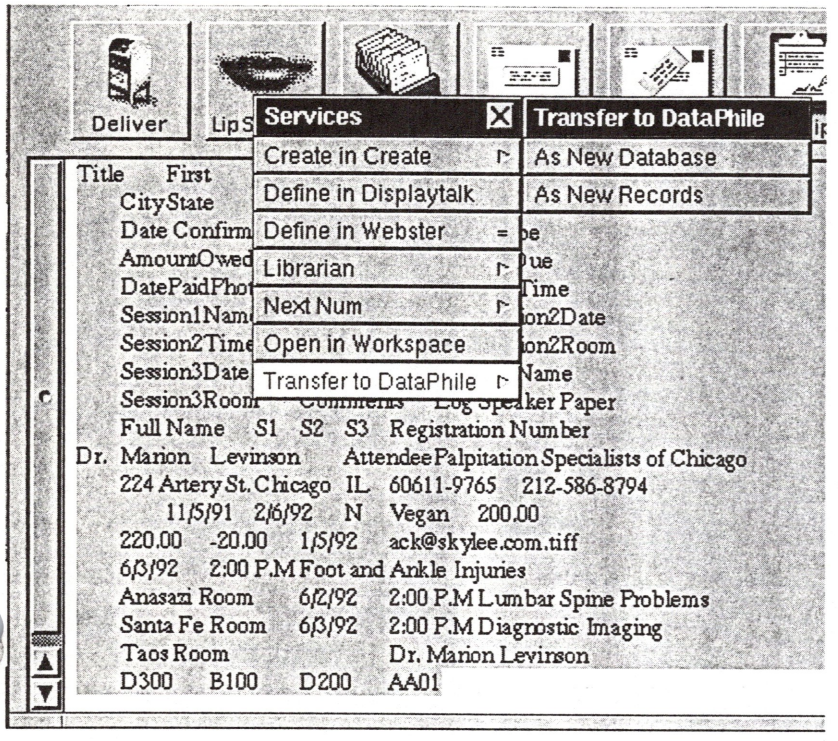
window. You will notice that all of the data in the record, not just that included in the key view, will be output into the mail window.



Send this selection to the person who is using the original copy of the database. Make sure that you do not change any of the spacing between the text.

The original user of the database, when s/he receives the mail, can then select the data in the Mail window and choose As New Records from the Transfer To DataPhile submenu of the Services menu in the Mail applica-

tion (see above for more information on how **DataPhile** inserts itself into the Services menu of other applications.).

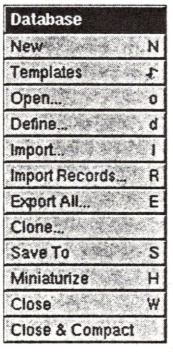

Deliver
Services
Create in Create
Define in Displaytalk
Define in Webster
Librarian
Next Num
Open in Workspace
Transfer to DataPhile
Transfer to DataPhile
As New Database
As New Records
Title First
City State
Full Name S1 S2 S3 Registration Number
Dr. Marion Levinson Attendee Palpitation Specialists of Chicago
224 Artery St. Chicago IL 60611-9765 212-586-8794
11/5/91 2/6/92 N Vegan 200.00
220.00 -20.00 1/5/92 ack@skylee.com.tiff
6/3/92 2:00 P.M Foot and Ankle Injuries
Anasazi Room 6/2/92 2:00 P.M Lumbar Spine Problems
Santa Fe Room 6/3/92 2:00 P.M Diagnostic Imaging
Taos Room Dr. Marion Levinson
D300 B100 D200 AA01

When the Import Records panel appears, click on the Best Guess button and then click OK. The selection will then be added as a new record to the original database.

Chapter 9
Menus

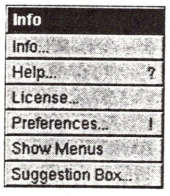
This chapter describes the menu commands in **DataPhile** in the order of their appearance. It is designed to provide you with a summary of **DataPhile's** capabilities as executed through the menus. For more information on the operations of the items described in this chapter, please look up the menu item or feature in the Index and refer to its descriptions in other sections.

The Main Menu



DataPhile's main menu contains the standard Info, Print, Hide, and Quit commands, as described in Chapter 7 of the NeXT User's Reference Manual.

The Info Menu



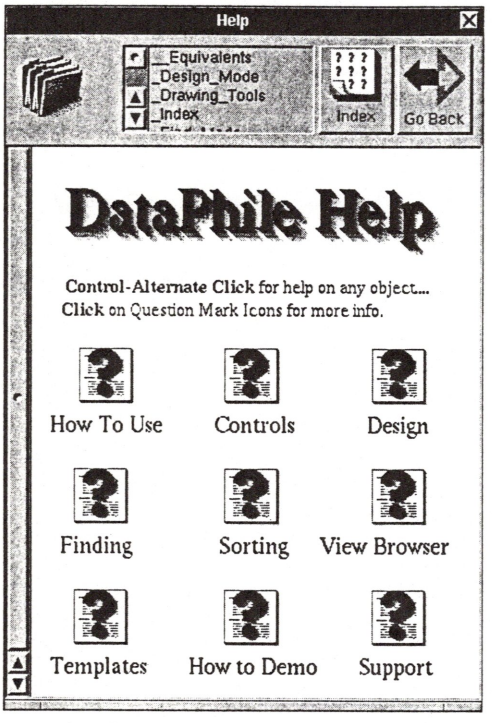
Info...

Look in the Info panel for version, user and licensing information.

Help...

DataPhile provides a detailed on-line help system.

When you want information on a particular topic or subtopic, hold down the Alternate and Control keys and click on a control. A Help window will appear with information on that item or an index to the help system. **DataPhile** tries to figure out what information you'd like by looking at your last action. If it involves a particular panel, **DataPhile** will present information on that panel.



When you want information on a particular topic or subtopic, click on the

icon to navigate to this subject. You can also click on a topic in the scrolling list of topics.

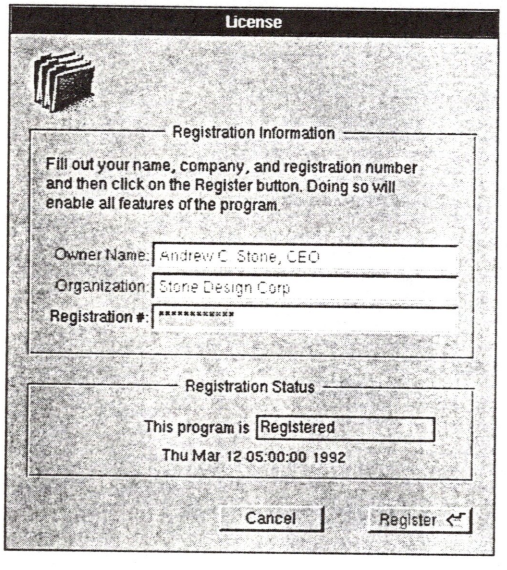
At any time, you can return to the index by clicking on the index button.

You can retrace your path through the help system by clicking on the Go Back button.

You can print information on a specific topic by choosing the Print menu item. When you're done with the Help panel, close it by clicking on the panel's Close button.

License...

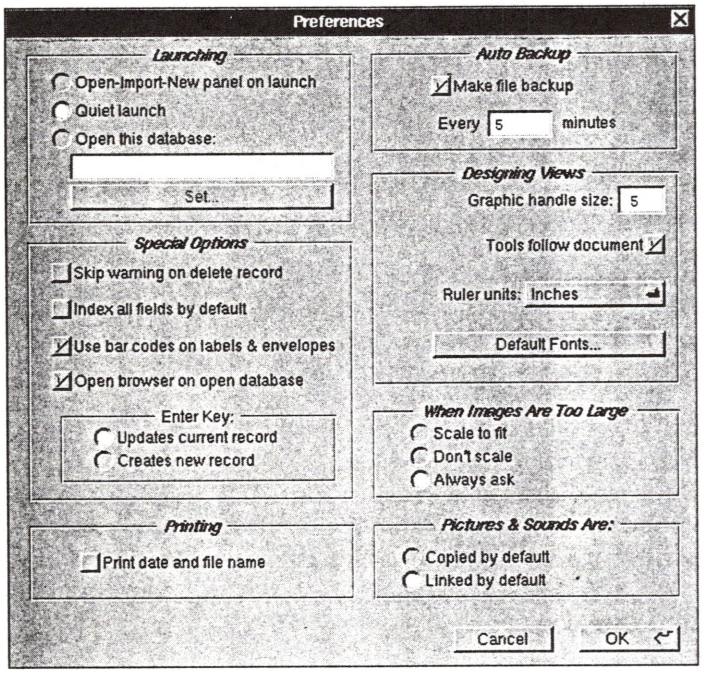
Click on License... to bring up the following registration panel.



This panel will tell you if your copy of **DataPhile** is registered, and if it is, to whom it is registered. If your program is not registered, you can register it at any time by entering a valid registration number along with your name and organization into the License panel. If you don't enter your name and organization, **DataPhile** may suddenly de-register itself.

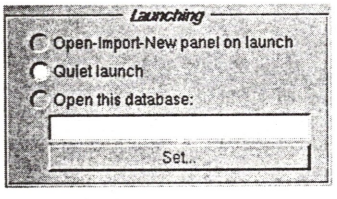
Preferences

There are some options of **DataPhile** that you can set in your Preferences window. These preferences, once registered, apply to the current document you are working on and all documents opened thereafter.



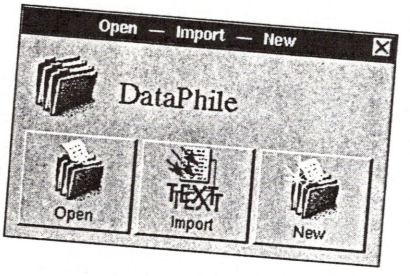
Launching

DataPhile will launch in three different ways. You can choose which way you prefer.



Open-Import-New panel on launch? Upon launch, **DataPhile** will present you with the following panel giving you the option of opening an

existing database, creating a new database, or creating a database from a text file.

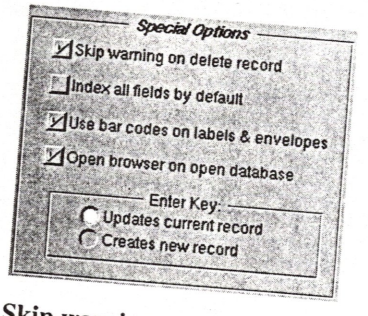


Quiet launch? Upon launch, **DataPhile** will open immediately to the main menu. This is the default setting.

Open this database: Upon launch, the database named in the text entry box below will be automatically loaded. You can specify the name and full path of the database to be loaded. Or, press the Set... button and choose the file from the standard Open panel that appears.

DataPhile will be able to find the file if its full path name is included. However, if you change the directory location of the file, make sure that the new path name appears in the text box. If the path is no longer correct, you will receive an autolaunch error message saying that **DataPhile** cannot find the specified file.

Special Options


Special Options
Skip warning on delete record
Index all fields by default
Use bar codes on labels & envelopes
Open browser on open database
Enter Key:
Updates current record
Creates new record

Skip warning on delete record: When this box is unchecked, a warning panel will appear when you try to delete a record. Check this box if you don't want the warning panel to appear.

Index all fields by default: Check this box if you want DataPhile automatically to create an index for every field in the database. When this box is checked, an index will be created for all fields, even those for which no

index is requested in the Define panel. Indexes take more disk space, but allow Find requests to be executed quickly.

Note: you probably want to turn off this option before you import text files into the database as your importing will take a relatively long time if indexes have to be created for each field.

Use bar codes on labels & envelopes: When this box is checked, bar codes will be automatically generated and printed on all labels and envelopes. For more information on bar codes, see Chapter 7.

Open browser on open database: When this box is checked, opening a database will also display that database's View Browser in the lower left hand corner of the screen. If the box is unchecked, the View Browser will not be automatically displayed, but you can always show it by choosing View Browser from the Tools menu (Command-B).

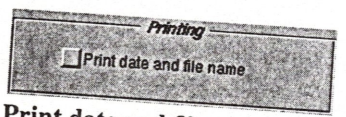
Enter key options

These options control how the Enter key behaves in Access mode.

Updates current record: When this option is selected, pressing the Enter key saves the current record. Your cursor moves to the next field.

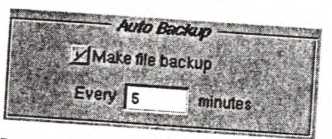
Creates new record: When this option is selected, pressing the Enter key saves the current record and creates a new record.

Printing



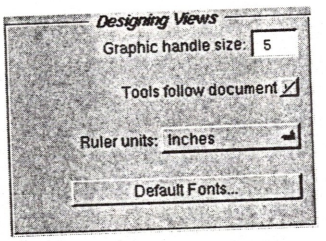
Print date and file name? When this box is checked, **DataPhile** documents will be printed with their filename and the current date.

Auto Backup



Make File Backup: Check this box if you want **DataPhile** to automatically make a backup of the database. We recommend that you leave this switch enabled. The number entered into the text entry box determines how often the backup is updated (in minutes).

Designing Views

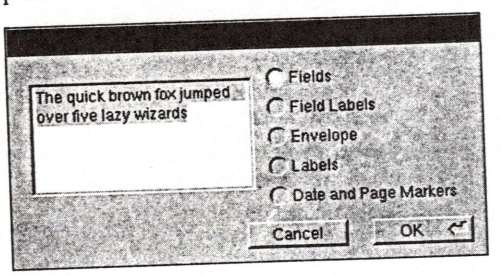


Graphic Handle Size: The number entered into this box determines the size of the handles (in points) that appear around selected graphic objects. The default setting is 5 points.

Tools follow document? Normally, the Tool palette in Design mode follows the key view wherever it is placed. When this box is checked however, the view and the Tool palette can be moved independently.

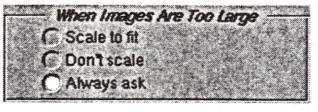
Ruler Units: This pop up menu controls the ruler units for the grid and rulers. Your rulers can be displayed in Inches, Picas, Points and Centimeters. The Ruler Units set here apply to newly created documents. Use the Page Layout panel to change the Ruler Unit settings in views that have already been created.

Default Fonts... Click on this button to display the following default font panel. A standard font panel will be displayed as well.



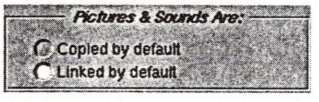
This panel shows you an example of the fonts and allows you to set default fonts for fields, field labels, envelopes, labels and date and page markers. Any font setting set for a particular feature in Design mode will override these settings.

When Images Are Too Large



These buttons determine the behavior when an image larger than the receiving picture field is dragged in. If "Always ask" is selected, you will be offered an option of scaling or not each time. To speed the process, you may always want to scale the image "Scale to fit", or always leave it alone, "Don't scale".

Pictures & Sounds Are



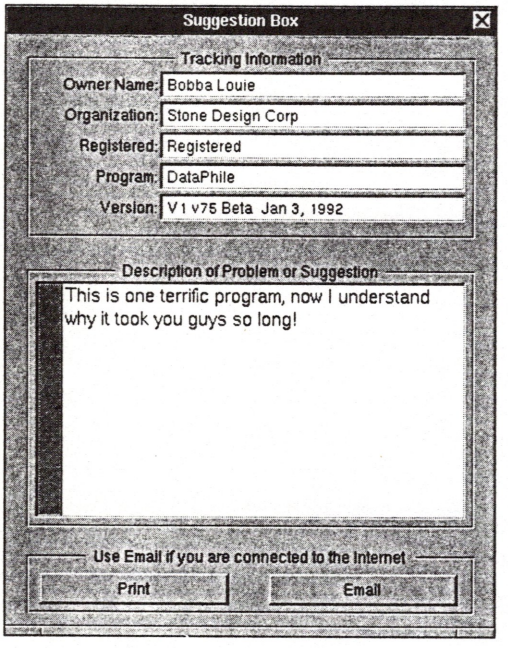
These buttons determine whether newly created Picture and Sound fields are "linked" by default or "copied" by default. You can always override the default setting on an individual field in that field's Options panel in the Define panel. For more information on linked vs. copied picture fields, see the description of the Picture field type in Chapter 3.

Show Menus

If you'd like to see all of **DataPhile**'s menus, choose the Show Menus command. When all the submenus are showing, the command toggles to Hide Menus, which will hide all the submenus. If you want a submenu to remain visible, move it before you choose Hide Menus.

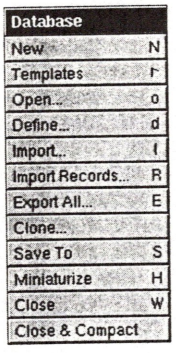
Here, all the menus are "shown."

Suggestion Box


Suggestion Box
Tracking Information
Owner Name: Bobba Louie
Organization: Stone Design Corp
Registered: Registered
Program: DataPhile
Version: V1 v75 Beta Jan 3, 1992
Description of Problem or Suggestion
This is one terrific program, now I understand why it took you guys so long!
Use Email if you are connected to the Internet
Print
Email

Use the Suggestion Box to make suggestions or report bugs to Stone Design. If you are on the Internet, press the Email button and your suggestion will be placed into an Email Send window which you can deliver to Stone Design. If you are not on the InterNet, please print your suggestion and send it to Stone Design, 2425 Teodoro NW, Albuquerque, NM 87107. We welcome and appreciate your comments!

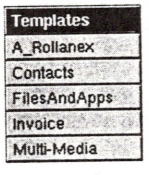
The Database Menu



New

Select New to create a new **DataPhile** document. The action automatically displays the Define panel so you can define the structure of your database. For more information on how to define a database, see Chapter 3.

The Templates Menu



We have included several database templates to help you get started using **DataPhile**.

Open

Use the Open command to open an existing **DataPhile** document. This command presents a standard Open panel for specifying which document to open (see Chapter 7 of your User's Reference Manual). The Open panel lists the names of all **DataPhile** documents in the specified directory. If you want to open a text file as a database, use the Import feature (see below).

Define

Choose Define when you want to add, delete or modify fields in your database. Define brings up the Define panel. See Chapter 3 for more information on defining the fields in the database.

Import...

Choose Import when you want to create a new database based on data in a text file. This brings up an Import Text File window in which you can set the name of the database to be created from the text file, set record and field delimiters, and choose a text file. Use this command when importing a text file that contains field names in the first line of text. If you want to import records into an existing database, choose Import Records (see below). For more information on creating a database from an import, see Chapter 2.

Import Records

Choose Import Records when you want to import data that is stored as text into an existing database. An Import panel appears which lets you choose the text file which contains the records you want to import into your database and set the delimiters of the data to be imported. After you select a text file, another panel appears that lets you match fields in the text file with fields in your database.

For more information on how to import records into the database, please see Importing Records in Chapter 6.

Export All

The Export All command exports all the data in the database to a text file. Choosing Export All brings up an Export All panel which allows you to name and locate the export file and set its data delimiters. The export file is a text file containing all of the data in the database. The default format for the export file is Tab delimited. This means that in the text file, the fields will be separated (delimited) by Tabs and records will be delimited by Returns. The first line (or record) will contain the field names. Later, if you want to import the information from this text file into an existing **DataPhile** database, or recreate a database from it, you will leave the

delimiter settings in their default positions (fields delimited by Tabs and records delimited by Returns.) Otherwise, set delimiters for your export file that are appropriate for the program into which you want to import the data. For exporting to Improv, WriteNow, WordPerfect or any other word processing program, see the Reports menu.

Export All is a good method for backing up your database since it exports the data from all the records defined in the database and the field names are exported along with the data. To recreate a database from a text file that has been created with the Export All command (using its default settings), you just need to choose Import from the Database menu and open the text file (see Import above and Backing Up Your Data in Chapter 10).

Clone

Choose Clone when you want to save an empty copy of your database. A clone of a database does not contain any records but contains all views and field definitions from the original database.

Save As/Save To

DataPhile automatically saves and makes a backup file of any database. Use the Save As command to give your newly created Untitled database a name and location in your directory structure. If you don't, when you close the database, you'll be asked if you want to save the database.

When the database has already been named and saved, use Save To to save a copy of it. Save As/Save To uses the standard Save panel to give a file name and directory location (see Chapter 7 of your User's Reference Manual).

Miniaturize

Choose Miniaturize to miniaturize the key database. When a database is miniaturized, all of its opened views and its View Browser are hidden and a database icon appears. The miniaturized icon will display as much of the file's name and path as can fit on the icon.

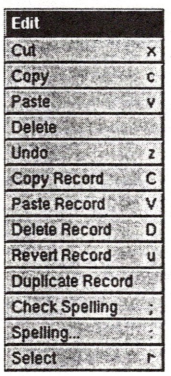
Close

The Close command closes the key **DataPhile** database including all of its views and its View Browser

Close & Compact

The Close & Compact command closes the key database and tries to recover unused disk space. This command is very time consuming and is most useful when you have deleted many records or copied pictures and sounds.

The Edit Menu



Cut, Copy, Paste, and Delete

These are the standard editing commands, as described in Chapter 5 of your NeXT User's Reference Manual. They work for graphic and text objects in Design mode, for data entered into fields in Access mode and for any text typed into text entry boxes (such as in the Define other panels).

You can also use Copy and Paste to transfer images from Design mode to other applications that understand EPS or TIFF graphic formats.

Undo

In **DataPhile**, you can almost always undo your last action. In Access mode, Undo will undo any modifications to a field. In Design mode, Undo will undo most previous actions.

Copy Record, Revert Record, Paste Record, Duplicate and Delete Record

Choose Copy Record when you want to duplicate the record that currently appears in the key view. This record will be copied onto the Pasteboard. Paste Record will create a new record from the contents of the Pasteboard. Duplicate Record creates a new record that is a copy of the current record in the key view, but does not affect the contents of the Pasteboard. Delete Record deletes the current record from the entire database. Revert Record returns an edited record that has not been saved (for which you have not pressed the Enter key) to its previously unedited state.

You can use Copy Record and Paste Record to copy a record into another database. The data will be transferred between fields with matching names.

You can also use Copy Record to copy a record to the Pasteboard for pasting into another type of document. The record is pasted into another application as text, with Returns between fields.

Check Spelling

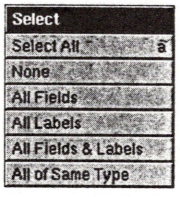
The Check Spelling command finds and highlights the next word in the current field that the dictionary does not recognize. You can then easily type in the correct spelling and override the incorrectly spelled word. Check Spelling only works when your cursor is active in a field in Access mode or in a Text object in Design mode.

Spelling

The Spelling command presents a Spelling panel that lets you check the spelling of words in a field, choose from possible corrections, and create customized copies of a spelling dictionary. If the spell checker finds a misspelled word in your document, you can double-click a correct guess in

the Spelling panel to immediately correct that word and have the spell checker continue finding words. For more information on how to use the Spelling checker and dictionaries, refer to Chapter 2 of the NeXT Applications Manual.

The Select Menu



Select All

Use this command:

- in Design mode, to select all the objects, including text objects and fields, in a window.

- in Access mode, to select all the data in a field.

None

The None command deselects all objects in design mode and all data within a field in Access mode.

All Fields

Use the All Fields command to select all the fields in a key view in Design mode.

All Labels

Use the All Labels command to select all the label objects in a key view in Design mode.

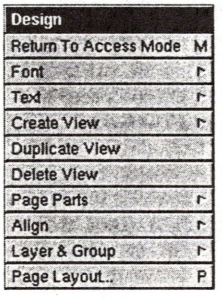
All Fields & Labels

Use the All Fields & Labels command to select all the fields and labels in a view in Design mode.

All of Same Type

Use the All of Same Type command to select all the objects of the same type as a selected object in a key view in Design mode. You must have one object selected for this menu item to be available. For example, if an oval object selected, choosing this menu item will select all oval objects.

The Design Menu

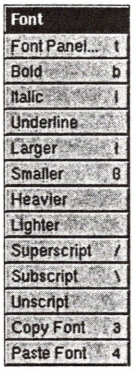


This menu contains some standard Format menu commands, as discussed in Chapter 5 of your NeXT User's Reference Manual as well as commands relating to Design mode in **DataPhile**.

Enter Design Mode/Return to Access Mode

This item toggles between Enter Design Mode and Return to Access Mode. Choose Enter Design Mode when the key view is in Access mode and you want to modify it. Choose Return to Access Mode when the key view is in Design mode and you want to use the view to enter, access or print records.

The Font Menu



This menu contains the standard Font menu commands, as discussed in Chapter 5 of your NeXT User's Reference Manual. Use these commands to change text font and size in a text object or field in Design mode. These commands also work on text entered into a RTF field. Options set before text is entered into a text object will apply to all text entered thereafter. To make font changes to text that has already been entered, first select the text and then make your changes.

Font Panel

The Font Panel command opens a standard NeXT font panel that indicates the current font and lets you change font properties of the current text selection or of text typed at the insertion point. To change the properties of previously entered text, make sure the text is selected and then choose the appropriate font properties. For further information, see Chapter 5 of the NeXT User's Reference Manual.

Bold, Italic, Underline, Larger, Smaller, Heavier, Lighter

Use these commands to set the characteristics of the text in your Text objects or fields in Design mode. They also work on selected text in an RTF field in Access mode. See Chapter 5 of the NeXT User's Reference Manual for more information.

Superscript, Subscript, Unscript

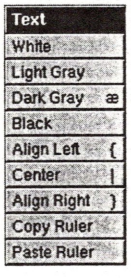
The Superscript command moves selected text up and the Subscript command moves selected text down an appropriate amount for a superscript or subscript. Choosing the command again moves the text up or down again.

Unscript returns selected superscripted or subscripted text to its normal position.

Copy Font and Paste Font

The Copy Font command copies the font at the insertion point or the beginning of the current selection, so that you can subsequently apply the copied font with the Paste Font command. The Paste Font command applies the copied font to the insertion point or current selection as though you had set the font with the Font panel. These commands don't change the contents of the pasteboard.

The Text Menu



These commands control the formatting of Paragraph Text (Text objects in Design mode and selected text in an RTF or Text field in Access mode). These commands can be selected before entering text to apply to text entered after the insertion point. To apply these commands to previously entered text, first select the text, then choose the appropriate text formatting command.

White, Light Gray, Dark Gray, Black

Use these commands to set the color of text.

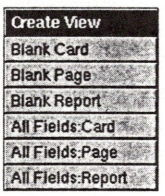
Left Align, Right Align, Center

Left Align aligns the text on the left side of the text object ("ragged right"). Right Align aligns the text on the right side of the text object ("ragged left"). Center centers the text between the right and left sides of the text object.

Copy Ruler, Paste Ruler

These commands allow you to copy ruler settings from one text selection and apply it to another text selection. If, within your text object, you have more than one ruler setting, be sure to highlight the section of text with the ruler that you want to copy. The Paste Ruler command applies the copied ruler to the insertion point or current selection as though you had set the ruler manually. Note that these commands don't copy and paste text, and so don't change the contents of the pasteboard.

The Create View Menu



Use these commands to create new views. The commands preceded by "All Fields" will include all currently defined fields. The other views will contain no fields. When you create a new view, the view will be in Design mode so that you can add, delete and rearrange fields and add graphic elements. See Chapter 4 for more information on creating views and Chapter 5 for information on modifying views.

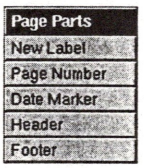
Duplicate View

Choose Duplicate View if you want to make a copy of the key view. The new view will be in Access mode.

Delete View

Choose Delete View if you want to delete the key view. You will be asked to confirm this choice in a Delete View alert box.

The Page Parts Menu



The items in the Page Parts menu are enabled only when the key view is in Design mode. They apply only to the key view.

New Label

Choose New Label when you want to add a label to a field that does not have one. Select the field which you want to label and then choose New Label. The label will be placed immediately to the left of the field and will contain the name of the field.

Page Number

Choose Page Number to insert a page number marker

into the active header or footer. To activate a header or footer, double click on it. This page number marker will automatically be replaced with consecutive page numbers when you print or preview records.

Date Marker

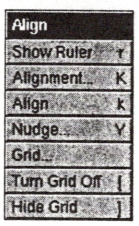
Choose Date Marker to insert a Date Marker

into the key view. This Date Marker can be put into the active header, footer or body of a view. It will automatically be replaced with the current date. You can format this date marker by selecting the marker and bringing up the Inspector panel (Command-1). The Date format inspector will be loaded into the bottom bay of the Inspector panel.

Header, Footer

These commands insert a header or footer into your key view. The headers and footers appear as an area marked by a dashed rectangle within the view window. To insert an object (either a field, text or graphic object) into the header or the footer, first double click on the header or footer to activate it. Then drag in the desired object. Pictures can be dragged into a header or footer from the File Viewer or can be pasted in using the Pasteboard. Objects that appear in the header area will appear once at the top of every page that is printed or previewed and objects that are in the footer will appear once at the bottom of every page that is printed or previewed. Headers and footers also appear in Access mode when Show as Card is selected from the Tools menu or when Show Header/Footer is selected from the Access menu.

The Align Menu



The commands in this menu aid in laying out views.

Show Ruler, Hide Ruler

Use this command to control the display of the ruler. When no object or a graphic object is selected, the ruler serves as a guide for layout for the entire key view. When the text cursor is active within a Text object, the ruler changes to a standard NeXT text ruler, which allows you control over the format of paragraphs: the left and right margins, indentation, and tab stops. You can set default ruler units for newly created **DataPhile** views through the Preferences panel. But you can change the ruler units for views in the Page Layout panel. For further information, see Preferences above and Chapter 1 of the NeXT Applications Reference Manual.

Alignment...

This command brings up the Align and Distribute inspector in the upper bay of the inspector panel. For more information on how to use this inspector, see Inspectors in Chapter 5.

Align

If you're going to align several groups of objects in the same way, you don't need to open the Align and Distribute inspector each time. Just choose Align to apply the current settings in the Align and Distribute inspector to selected objects.

Nudge

Nudge... brings up the Nudge inspector which gives you precise controls over the size and location of a selected object. Use the arrow buttons to nudge the object, the X and Y origin text entry boxes to input an exact location and the Width and Height text entry boxes to set an exact size of the selected object. See Chapter 5 for a more detailed description of the Nudge inspector.

Grid..., Turn Grid On/Off, Show/Hide Grid

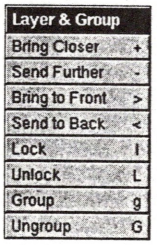
These commands allow you to control the grid in a view (see the discussion of grids in Chapter 5). Grid... brings up the Grid inspector in Design

mode so you can change the size of the grid, turn the grid on or off, and make it visible or invisible.

Turn Grid On (which toggles to Turn Grid Off when the grid is active) allows you to make the grid active. When the Grid is active, objects "snap" to the Grid when created or moved.

Show Grid (which toggles to Hide Grid when the grid is visible) allows you to make the grid visible without using the Grid inspector.

The Layer and Group Menu



These commands control the relationships among objects. Each object (whether single or grouped) has a front to back position in a view. See Arranging Objects in Chapter 5 for a more detailed discussion of these commands.

Bring Closer:
moves a selected object one position forward.

Send Further:
moves a selected object one position further back.

Bring to Front:
moves a selected object in front of all other objects.

Send to back:
moves a selected object underneath all other objects.

Lock, Unlock

Locking selected objects makes them into non-objects; they become part of the background and can't be selected, moved, or modified. You can lock

more than one object at once. You may also lock objects in sequence. Unlock unlocks all previously locked objects.

Group, Ungroup

You can take several objects and group them into one object with the Group command. To group objects, select them and choose Group. When objects are grouped, they can be moved as a group. Ungroup separates a group object into its original separate objects. The Group command can also be used to set the Tab order of fields.

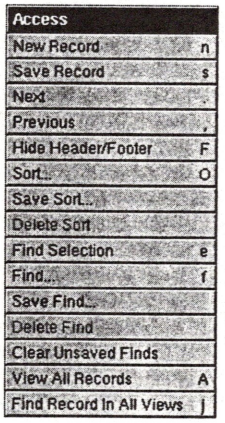
For more information and examples of grouping for manipulation or Tab order, see Chapter 5.

Page Layout

Use the Page Layout command to set various options that affect the size and margin of a view. The Ruler units (inches, points, centimeters, picas) for each **DataPhile** view are controlled through this panel. If you want your ruler to appear automatically with particular ruler units, you set these through the Ruler Units menu in the Preferences panel. The difference is that the ruler units set in the Preferences panel apply to a default ruler that appears when the program is launched. The rulers set in the Page Layout panel apply to the key document and can override the rulers set in the Preferences panel.

You can also use the Page Layout panel to define the size of a page for a Report or Page view.

The Access Menu



This menu contains some commands relating to Access mode in **DataPhile**. You will want to put the key view into Access mode when you are entering, viewing or printing data.

New Record

Choose New Record when you want to add a record to your database. You can also add a new record by clicking the New Record button in the Access controls or by pressing the Enter key if you've set your Preferences so that Enter key creates a new record (see Preferences above for more information on this option).

Save Record

Choose Save Record when you want to save the changes made to a record. You can also save a record by clicking the Save Record button in the Access controls or by pressing the Enter key if you've set your Preferences so that Enter key updates the current record (see Preferences above for more information on this option). A saved record cannot be reverted to its previous state.

In **DataPhile** records are automatically saved when you leave the current record, so you do not have to explicitly save each record.

Next

The Next command moves you the next record in your current view of the database. This accomplishes the same thing as clicking on the Next button in the Access controls.

Previous

The Previous command moves you to the previous record in your current view of the database. This accomplishes the same thing as clicking on the Previous button in the Access controls

Show Headers, Hide Headers

This toggle menu option controls the display of the headers and footers when View As Report is selected. When Show Headers is selected, the menu item appears as Hide Headers. When Hide Headers is selected, the menu item appears as Show Headers.

Sort

Choose Sort to arrange the records in the current view of your database based on the contents of specified fields. For example, you can sort all the records in the database by last name so that the records will appear alphabetically by last name.

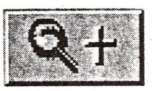
Sort brings up a Sort panel which allows you to specify the fields and order by which you want the information sorted. For more information on how to Sort records, see Sorting Records in Chapter 6.

Save Sort

Save Sort allows you to save the currently selected Sort order so that you can use it in a future **DataPhile** session. It brings up a Save Sort dialog box in which you can view all currently saved Sort orders and name a new one. For more information on saving Sort orders, see to Sorting Records in Chapter 6.

Find

Choose Find to search for records that meet certain conditions or criteria. Choosing Find from the menu accomplishes the same thing as pressing the Extended Find button in the Access controls.



This places the view in Find mode, where you can enter your search criteria. In Find mode, you can execute, save and delete Find requests. For more information on how to search for sets of records, see Finding Records in Chapter 6.

Save Find

Save Find allows you to save the currently applied Find request. It brings up a Save Find dialog box in which you can view all currently saved Find requests and name a new one. You can save a Find request after it is executed or while the view is in Find mode. For more information on saving Find requests, see Finding Records in Chapter 6.

Delete Find

Delete Find allows you to delete a Find request when the view is in Find mode. The Find request that is currently selected from the Find pop-up menu in the Find controls will be deleted without any confirming dialog box. For more information on deleting Find requests, see Finding Records in Chapter 6.

Clear Unsaved Finds

Clear Unsaved Fields allows you to instantly clear all unsaved Find requests from the Find pop-up menu in the Find controls. Since all Find requests executed in a using session are placed into the Find pop-up menu, the list in the pop-up menu can get so long that new Find requests are no longer displayed. This option allows to user to keep in that menu only those Find requests that have been saved using the Save Find command.

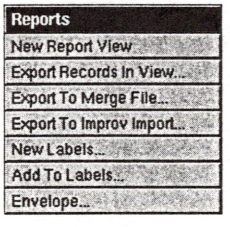
Find Record In All Views

Find Record In All Views displays the key view's found set and current record in all open views.

View All Records

View All Records finds all records in the key view. This can also be accomplished by clicking on the View All button in the Access controls.

The Reports Menu



Use the items in the Reports menu for putting data into a format for printing within **DataPhile** or for exporting for integration into other programs. For information on creating Report views in **DataPhile**, see Chapter 4. For more information on using **DataPhile**'s unique label and envelope report generators, see Chapter 7. For more information on exporting data for use in other applications, see Chapter 8.

New Report View

Click on New Report View when you want to create a new Report view that will be used specifically for printing or exporting. The default view that is created as a new Report view contains all the fields in the database in column format and is shown as a list.

Export Records in View

Choose Export Records when you want to export a group of records to a text file. Export Records in View only exports the data in the fields in the key view for the found set of records. Export Records brings up a Save panel that lets you name and locate the exported text file and set the field and record delimiters. If you want to export formatted text, with fonts corresponding to the fonts used in your fields, check the Export as RTF box.

If you want to export all the information (fields and records) in the database, then you will want to use the Export All command in the Database menu (see Export All above).

Export to Merge File

Choose Export to Merge File when you want the exported records (from the key view) to be formatted for merging into a word processing document. This feature lets you name and locate your export file and export format. Export to Merge File exports the records into formats used by WriteNow or WordPerfect, or allows you to specify your own field and record delimiters for merging into other word processing programs.

Export to Improv Import

Choose Export to Improv Import when you want to export a group of records for importing into a Lotus Improv spreadsheet. Export to Improv Import brings up a standard Save type panel which allows you to name and locate the export file. That file can then be opened by or imported into Lotus Improv.

New Labels

Choose New Labels to access **DataPhile**'s pre-defined Label report. The current found set of records will be automatically positioned in a default Label report, with each record contained in a text object. In this Label report you can specify the type and number of labels to be printed as well as page and margin sizes. The contents of the text object in the label depends on the fields and field layout in the key view. For more information on creating labels, see Chapter 7.

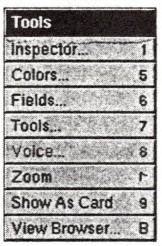
Add to Labels

Choose Add to Labels when you want to add records to a label report after the Label report has already been generated. You can add a found set of one or many records. Find the records you want to add to an open Label report and click on Add to Labels.

Envelope

Choose Envelope to access **DataPhile**'s pre-defined Envelope report. The current record will be automatically positioned in the default Envelope report as a single text object. The text order is determined by the field lay-out in the view that is key when you choose Envelope from the menu. In this Envelope report you can set the size of your envelope, add graphics and text, reposition objects, and save your format for later use. You can also choose to print the current envelope or print an envelope for every record in your current found set. For more information on generating Envelope reports, see Chapter 7.

The Tools Menu



The Tools menu gives you access to a number of helpful tools included in **DataPhile**. Some of the tools are available only in Design mode, some only in Access mode, and some are available in both modes. You will know which tools are available in a particular mode by which ones are enabled in the menu.

Inspector...

This command opens or deminiaturizes the Inspector panel so you can examine and modify the characteristics of selected graphic objects and set

the field formatting in Design mode. See Chapter 5 for a complete description of how you can edit the characteristics of objects and format fields using the various inspectors that are loaded into the Inspector panel.

Colors...

Use this command to bring up the NeXT color panel. You can use standard NeXT color techniques to add colors to your views. Also see Chapter 10 for some specific methods for using colors in **DataPhile**.

Fields...

Use this command to bring up the Unused Fields palette in Design mode. This palette will display all of the fields that are defined in the database but that do not appear in the key view. To add a field to a view, just drag one from this palette into a view. The Unused Fields palette also allows you to specify whether you want a label added with the field and to access Define mode to quickly define new fields. For more information on how to add fields to a view, see Chapter 5.

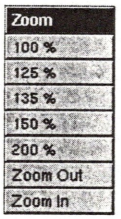
Tools

This command displays the Tool palette. See Chapter 5 for a thorough description of the various tools available in Design mode.

Voice

The Voice command brings up the Voice Annotation panel which allows you to make a voice insert into the current record. See Voice Annotation in Chapter 6 for more information on how to add a Voice Annotation to a record.

The Zoom Menu



Use the Zoom menu commands when you want to look at a magnified or reduced view of a key **DataPhile** view. A magnified view is useful when you're fine tuning the spaces between separate graphic objects and fields.

Use the Zoom menu commands to quickly set any of the seven preset zoom commands. You may also use the Zoom Out command to move sequentially through smaller views and the Zoom In command to move sequentially through the larger views. For example, if your document is at 120% view, Zoom Out will set it to 100%, Zoom In to 135%. You can't zoom out if you're view is at 100%.

Remember that zooming changes your view of the images, not the images themselves. When you copy and paste an image (or a group of images), it will retain and display its unzoomed size. Therefore, it's a good idea to return to 100% zoom before copying a partial image to the Pasteboard or to another **DataPhile** document.

Show as Report, Show as Card

Use this toggle command to control how many records are displayed at once when you view, preview or print your records. When one of these options is selected, the other will be displayed in the menu. When Show as Card is selected (Card view), only one record can be displayed at once, or, when printing, printed on each page. When Show as Report is selected (Report view), many records can be displayed or printed on one page, depending on how much space the records take up and how large the view or page size is. This menu item actually changes a Card view to a Report view and vice versa.

View Browser

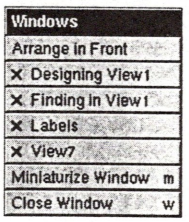
This command opens a View Browser for every open **DataPhile** database. All views that you create appear in the View Browser. From the open View Browsers, you can open or activate views, rename them or set them as the default opening view of the open databases. Even if you close all the views for a database file, if that file's View Browser is open, you can reopen the views.

To rename a view, double click the view's current name in the View Browser and type in the desired name.

To load any of the views in the View Browser, click on the box to the right of the view's name. The view whose radio button is selected is the view to which your database will open.

See Chapter 6 for more information on how to use the View Browsers to load views.

The Windows Menu



This menu contains items that control your view of open **DataPhile** databases and their associated views.

Arrange in Front

This command arranges active and inactive windows in the middle of the screen in the order in which they were created. This command also deminiaturizes any open **DataPhile** documents, again in the order in which they were created.

X DocumentName

This menu item allows you easy access to your various open **DataPhile** views. Click on a view from this menu and it becomes the key view. If the view has been miniaturized, **DataPhile** deminiaturizes it. Obviously, the contents of this menu vary depending on what views you have opened.

Since **DataPhile** contains an autosave feature, all **DataPhile** views that have been named appear with an X in front of them indicating that their changes have been saved. Even if a database is called Untitledx, it will still appear as saved in the Windows menu since it has been temporarily saved to the /tmp directory. For more information on naming and saving databases, refer to Chapter 2.

Miniaturize Window

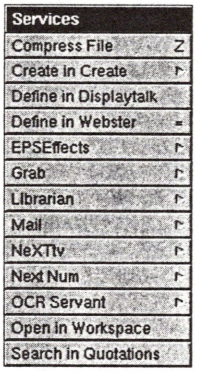
The Miniaturize Window minaturizes the key view or View Browser. The miniaturized view icon will display the name of the view (not the file) and the miniaturized View Browser icon will display the path name of the file. When you miniaturize the View Browser, all open views will be hidden.

Views can be deminiaturized by either double-clicking on the window's icon or by choosing the document from the Window menu (see above). Miniaturized View Browsers can be deminiaturized by double clicking on their icon or choosing View Browser from the Tools menu. When you deminiaturize the View Browser, all open views are unhidden.

Close Window

The Close Window closes the key view. It has the same effect as clicking the close button in the key view's title bar. You can close all open views and still have access to your database through the View Browser.

The Services Menu



The Services menu contains commands that request the services of another application, causing that application to start up (if it's not already running) and take an action on a file or selected text. For more information on the services menu and the applications it controls, see chapter 7 of your NeXT User's Reference Manual.

Also, for information on how **DataPhile** is included in the Services menu of other applications, see Chapter 8.

Chapter 10
Shortcuts, Backup and Troubleshooting

This chapter contains information on **DataPhile**'s command key equivalents, mouse shortcuts, information on how to maintain and backup your database, what to expect in future versions of **DataPhile** and some troubleshooting tips.

Command Key Equivalents

You can choose many commands either through menus or by using Command keys. If you have set any Command keys for commonly used NeXT features in your Preferences application, those will override **DataPhile**'s default command keys.

DataPhile Menu

Print	Command-p
Hide	Command-h
Quit	Command-q

Info Menu

Help	Command-?
Preferences	Command-!

Database Menu

New	Command-N
Open	Command-o
Define	Command-d
Import	Command-I
Import Records	Command-R
Export All	Command-E
Save To	Command-S
Close	Command-W
Miniaturize	Command-H

Edit Menu

Cut	Command-x

Copy	Command-c
Paste	Command-v
Copy Record	Command-C
Paste Record	Command-V
Revert Record	Command-u
Delete Record	Command-D
Check Spelling	Command-;
Spelling...	Command-:
Select All	Command-a
Undo	Command-z

Design Menu

Enter Design Mode	Command-M
Return to Access	Command-M
Page Layout	Command-P

Font Menu

Font Panel	Command-t
Bold/Un-bold	Command-b
Superscript	Command-/
Subscript	Command-\
Copy Font	Command-3
Paste Font	Command-4

Text Menu

Align Left	Command-{
Center	Command-|(Vertical bar)
Align Right	Command-}

Align Menu

Show Ruler	Command-r
Alignment	Command-K
Align	Command-k
Nudge	Command-Y
Turn Grid Off/On	Command-[
Hide Grid	Command-]

Layering &Group Menu

Bring Closer	Command-+
Send Further	Command--
Bring to Front	Command->
Send to Back	Command-<
Lock	Command-l

Unlock	Command-L
Group	Command-g
Ungroup	Command-G

Access Menu

New Record	Command-n
Save Record	Command-s
Next	Command-.
Previous	Command-,
Show Header/ Footer	Command-F
Sort	Command-O
Find Selection	Command-e
Find	Command-f
View All Records	Command-A
Find Record in All Views	Command-j

Tools Menu

Inspector	Command-1
Colors	Command-5
Fields	Command-6
Tools...	Command-7
Voice	Command-8
Show As List/ Show As Card	Command-9

Windows Menu

View Browser	Command-B
Miniaturize Window	Command-m
Close Window	Command-W

Services Menu

Compress File	Command-Z

Mouse Shortcuts

Double-click

- in a text field on a panel or in any text, date, value, money or boolean field to select the word that contains the cursor.

- inside a Paragraph Text object or a field to edit the text.

- on an object in Design mode to bring up its inspector.

Shift-click

- in Design mode, on an unselected graphic object or field, to add it to the selection.

- in Design mode, on a selected graphic object, to remove it from the selection.

Command-click

- in Access mode on lips icon brings up voice editing panel.

Alternate-click

- in Access mode, when the field is not currently selected, sorts by that field.

Control-click

- in Design mode, if a tool is selected, provides you with temporary selection arrow.

Control-Alternate-click

- calls up the on-line Help for whatever you click on.

Command-drag

- in Design mode, to override any grid in effect while moving or resizing.

- in Design mode, to allow you to place a field or object outside of the limits of the view.

Alternate-drag

- in Design mode, on a Card view in Design mode enlarges or shrinks all ungrouped fields.

- in Design mode, when creating and resizing a graphic object or field—to constrain the sizing of the object to proportional sizing.

- in Design mode — to constrain the movement of that object in a window to a purely horizontal or vertical movement, depending on in which direction the movement was initiated.

- in Design mode—to require that objects be completely enclosed in the resulting selection rectangle in order to be selected.

Alternate-Return

- in Access mode, allows you to place a return in a Text, Date, Value, or Money field.

Backing Up Your Data

You should back up your data on a regular basis. No, ifs, ands, or buts. If you are using a database in any program, you should regularly back up your data. We recommend that you do it at the end of every day.

In **DataPhile**, to back up all the data in your database, choose Export All from the Database menu. This will export all the data in all the fields and records in the entire database to a text file. In the Export All panel that appears, you can name and locate your backup text file. If anything does happen to your database, you can automatically recreate it from this exported text file using the Import command from the Database menu. For more information on how to recreate a database from a text file, see Chapter 2.

You might also keep an empty clone of your database around so you'll have all your views already created. Then you can use the Import Records command to import your backup data into this clone. For information on importing records into an existing database (or clone), see Chapter 6.

Here's a strategy for data security:

1. After making sophisticated views or major structural changes to your database, save clones of your database

2. Export All daily.

3. Make an additional copy of your database daily.

4. If your database gets corrupted, and your backup gets corrupted, you'll be able to open your clone and Import Records from your Export All text files to restore your database.

What to Expect in DataPhile Version 2

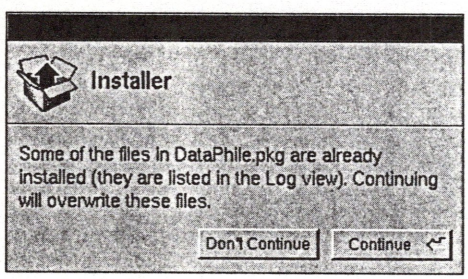
We hope to ship a complete upgraded version of **DataPhile** sometime after the public release of NeXTStep 3.0. We do not as yet have a full feature list, but some features that you can expect are:

- Multiuser access, including file and record locking.
- Summary fields
- Lookup fields

Troubleshooting

Problems with Installing

When you install **DataPhile** onto your network, you should make sure that there are no other copies (beta or otherwise) anywhere else on your network. If a copy of **DataPhile** already exists in the directory into which you are attempting to install **DataPhile**, the following message will appear.


Installer
Some of the files in DataPhile.pkg are already installed (they are listed in the Log view). Continuing will overwrite these files.
Don't Continue
Continue

Choose Don't Continue to return to the main Installer window so that you can delete the existing DataPhile package (see Deleting DataPhile below).

Deleting DataPhile

The best way to delete **DataPhile** is to use the Installer to delete DataPhile.app and its package.

1. Launch the Installer.

2. Choose Open from the File menu. You get an Open panel which defaults to the Packages directory. Click on the ThirdParty directory. Click on the **DataPhile** package in the ThirdParty directory and press OK. The Delete button in the main installer panel will now be available. Click on Delete. **DataPhile** will then be deleted from the ThirdParty directory and from the ~Apps directory into which it was originally installed.

Problems With Registration

If you are having problems getting **DataPhile** to remember its registration information, try the following steps.

- Make sure all old copies of **DataPhile** are deleted from your network (see Deleting DataPhile above).

- Make sure that you have entered your name and organization information into the License window.

- Make sure that you have read/write access on DataPhile.app.

Appendix A
Calculated Field Components

When to Use Calculated Fields

Define a field as Calculated when you want the result of the calculation involving data from other fields within the same record. Examples of ways that you can use Calculated fields include:

- On an invoice defining a Total Sale field as the result of the Sale field plus the Tax field plus the Shipping field.

- To create a salutation field based on a Last Name and a Gender field so that the appropriate title is chosen for man or a woman as in the following calculation: "Dear"&if(Field"Gender"="M","Mr.","Ms.")&" " &Field"Last Name"&":"

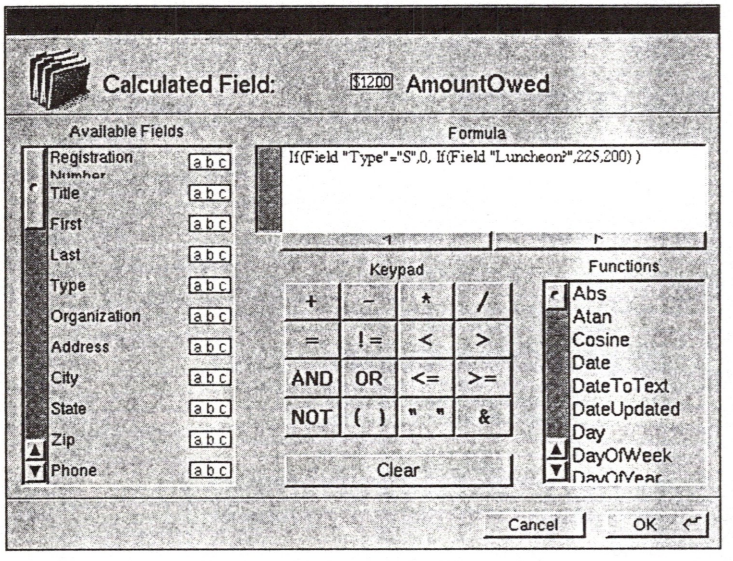
- In our medical conference database, we calculate the price of the convention based on whether an attendee is a speaker, exhibitor or attendee; and whether they want the luncheon or not. The formula for Amount Owed is: If(Field "Type"="S",0, If(Field "Luncheon?",225,200))

In this version of **Dataphile**, calculated fields don't summarize values from multiple records. To get summarized values, use **DataPhile**'s export capabilities to transfer data to a spreadsheet program like Lotus Improv.

In a Calculated field, the result is always the result of the formula applied to the values in the current record. The values in Calculated fields cannot be modified by the user.

You can modify a Calculated field formula at any time by bringing up the Define panel, choosing Options and then clicking on the edit field button to bring up the Calculated Field panel below. If you change a Calculated

field formula, the field's value in already existing records will be modified to reflect the new formula.



Calculated Field Formula Components

Calculated field formulas include operators, functions, and field names. Formulas for Calculated fields are very similar to algebraic expressions, with field names used as variables instead of letters (x,y,z). You can enter a formula by typing and editing in the Formula entry field. Or you can click on the various components to insert them into the Formula entry field.

DataPhile uses standard precedence (mathematical order) rules: in a formula without any parentheses, exponentiation is calculated first, then multiplication and division and then addition and subtraction. You can override these rules with the use of parentheses.

Typing

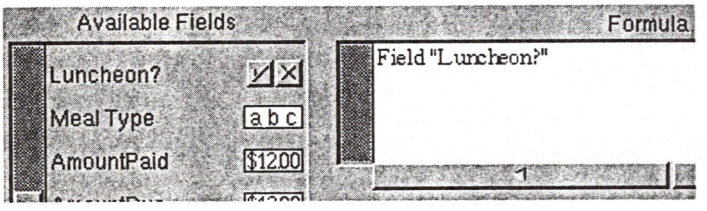
Operators and functions work with certain types of values. For example, it wouldn't make sense to divide a text value by another text value or to add two dates together (although it does make sense to subtract one date from another to get the number of days in between). **DataPhile** checks to make sure that the types in the formula conform to the types expected by the various operators and functions.

Other Fields

Choose fields to be used in your Calculated field formula by clicking on them in the Available Fields area in the Calculated Field panel. All fields, except the field whose formula you're editing, are available for use. When a field is inserted into the Formula entry field, it will appear as follows:

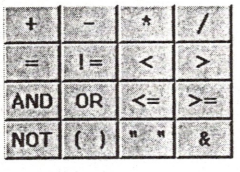
Field "fieldname"

If you choose to type in field names, you should also use that syntax.



Keypad Operators

Use the operators that appear in the Keypad to insert arithmetic, comparison, logical and text operators into your formula. To insert one of these operators into your Formula box, click on it once.



Arithmetic Operators

+

Add two numeric values together. Addition works with value and money types. You can also add a value to a date.

-

Subtract one numeric value from another. Subtraction works with value and money types. You can subtract a value from a date and you can subtract a date from another date.

Example
Field "Date Paid" - Field "Date Due" > 60

*

Multiply a numeric value by another numeric value. Multiplication works with value and money types. It doesn't work with dates.

/

Divide a numeric value by another numeric value. Division works with value and money types. It doesn't work with dates.

Comparison Operators

These operators compare two values and return a Yes or No based on that comparison. The result of a comparison operator can be used any place a yes or no value would be expected. For example, the result could be used by a Yes/No/Empty field or with the If function. Comparison operators work with numeric values, dates, and text. The two values must be of compatible types; you can't compare a numeric value and a text value, for example.

=

Returns Yes if two values are equal.

!=

Returns Yes if two values are not equal.

<

Returns Yes if the first value is strictly less than the second value.

<=

Returns Yes if the first value is less than or equal to the second value.

>

Returns Yes if the first value is strictly greater than the second value.

>=

Returns Yes if the first value is greater than or equal to the second value.

Logical Operators

Logical operators take Yes/No values as operands and return a boolean value.

And

Returns Yes if both values are Yes. Otherwise it returns No.

Or

Returns Yes if either value is Yes.

Not

Returns Yes if its operand is No and No if its operand is Yes.

Text Operators

&

Join (Concatenate) text

Takes two text operands and creates a single text string as a result.

Miscellaneous Keypad Items

()

Inserts a matched set of parentheses and places the cursor between them.

“ ”

Insets a matched set of quotes and places the cursor between them.

Constants

You can enter characters or words to appear as constants in your calculated fields. Text constants are indicated by quotation marks and are not preceded by the word Field. In the following example, “Dear ”, “M”, “Mr.”, “Ms.”, “:”, and “ ”(space) are all constants:

“Dear ”&if(Field “Gender”=“M”, “Mr.”, “Ms.”)&“ ”&Field “Last Name”&“:”

If you want to use carriage returns or tabs in a Calculated field result, you can use "\n" for a carriage return and "\t" for a tab.

You can also enter numbers as constants; if you want the number to be treated as a value, don't use quotation marks. If you want the number to be treated as text, use the quotation marks. For example, if you want to calculate a date that's a week later than another date, you could use:

Field "FirstDate" + 7

Functions

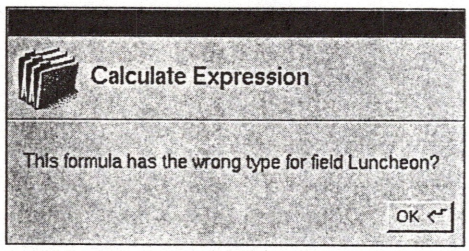
Insert a function in the Function list into the Formula box by clicking on it once. These functions include mathematical, financial, text, date, logical and conversion operations. Most functions take one or more arguments; a few do not require an argument. When you click on a function, the name of the function and its arguments appear in the Formula entry field. The arguments appear delimited by double angle brackets; use the tab key or the arrow buttons below the Formula entry field to select each argument in turn. For example, when you click on the function Left, you'll see:

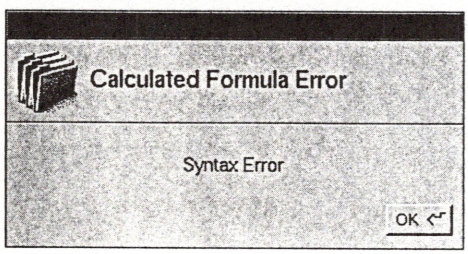
Left(«String»,«NumberOfCharacters»)

which tells you that Left is a function with two arguments. The first needs to be a text value and the second needs to be a number.

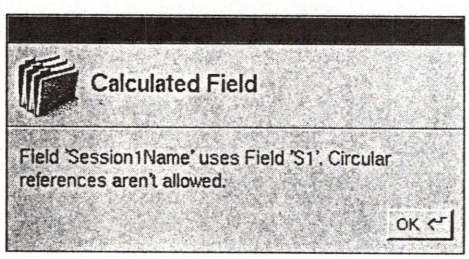
Error Checking

When you're done editing your formula, press the OK button. **DataPhile** will check the formula and warn you of syntax and type errors. It will also





warn you if you have a circular reference to a field. An example of a circular reference would be if you defined Field 1's formula to use Field 2, but Field 2's formula uses Field 1.



Function List and Examples

Abs

Abs(«Number»)

The **Abs** function returns the absolute value (positive value) of the Number supplied.

Abs(-33) equals 33.

Atan

Atan(«Number»)

The **Atan** function returns the trigonometric arc tangent (inverse tangent) of the number supplied. The arc tangent is the angle, in radians, whose tangent is equal to the number. If you want to convert the result from radians to degrees, multiply the result by 180/PI or use the Degrees function.

Atan(1) equals 0.785 (pi/4 radians)

Degrees(Atan(1)) equals 45

Cosine

Cosine(«Number»)

The **Cosine** function returns the cosine of the angle (number) supplied. The angle must be in radians.

Cosine(0) equals 1

Cosine(Radians(45)) equals .707

Date

Date(«Month»,«Day»,«Year»)

The **Date** function returns a date from the supplied month, day and year parameters, which should be integers.

Date(2,12,56) equals February 12, 1956

DateToText

DateToText(«Date»)

DateToText converts a date value into text.

DateToText(Date(2,12,56)) equals "2/12/56"

DateUpdated

DateUpdated

The **DateUpdated** function will enter the current date every time you create or change a record. This is useful to let you know when you last changed any field in a record.

Day

Day(«Date»)

The **Day** function returns the day component of the date supplied.

Day(Field "Date") equals 12 (when the contents of the field Date is February 12, 1956)

DayOfWeek

DayOfWeek(«Date»)

The **DayOfWeek** function returns text with the name of the day of the week.

DayOfWeek(Field"Date") equals Sunday (when the contents of the field Date is February 12, 1956)

DayOfYear

DayOfYear(«Date»)

The **DayOfYear** function returns the number of days since January 1 of the date supplied in Date.

DayOfYear(Field"Date") equals 359 (when the contents of the field Date is December 25, 1991)

Degrees

Degrees(«Number»)

The **Degrees** function returns 180/pi times the Number supplied.

Degrees(Pi/2) equals 90

Exact

Exact(«String1», «String2»)

The **Exact** function returns true if the first string is identical to the second string.

Exact("Hello","hello") equals No

Exact("Hello","Hello") equals Yes

Exp

Exp(«Number»)

The **Exp** function returns the exponential of the number supplied.

Exp(1) equals 2.718281828

Exp(Ln(5)) equals 5

FileName

FileName(«Field»)

The **FileName** function returns the full path name of the field supplied. The **FileName** function can only be applied to Picture, Sound and File fields.

FileName(Field "Picture") might return /LocalLibrary/Images/People/ali.tiff

FutureValue

FutureValue(«PresentValue»,«InterestRate»,«NumberOfPeriods»)

The **FutureValue** function returns the future value of an investment based on period and constant payments and a constant interest rate for the specified period.

If you wanted to calculate the value of an investment for which you paid $50 a month for 5 years at 11% interest, you would use this formula:

FutureValue(50,.11/12,60) equals 3975.90

Notice that since the number of periods in this case is months, the interest rate is divided by 12 to get the monthly interest rate.

If

If(«BooleanExpression»,«TrueValue»,«FalseValue»)

The **If** function returns one of two possible values depending on the value of Boolean Expression. If the expression is true, then TrueValue is returned. Otherwise FalseValue is returned.

If(DayOfWeek(Today)= "Tuesday", "This must be Belgium", "I don't know where we are!")

TrueValue and FalseValue can be expressions of any complexity. By nesting If statements, you can create more complex constructs:

If(Middle(Field "S2",1,1) = "1","Santa Fe Room", If(Middle(Field "S2",1,1)="2" ,"Taos Room", If(Middle(Field "S2",1,1)="3" ,"Anasazi Room"," ")))

If your boolean expression depends on a field which is not filled in, the If function returns empty.

InitialCaps

InitialCaps(«String»)

The **InitialCaps** function capitalizes the first letter of each word in String.

InitialCaps("let your life proceed by its own design") equals

"Let Your Life Proceed By Its Own Design"

Integer

Integer(«Number»)

The **Integer** function returns the largest integer value less than or equal to Number, also known as the floor.

Integer(1.9) equals 1

Integer(-4.3) equals -5

IsEmpty

IsEmpty(«Field»)

The **IsEmpty** function returns true if the Field is empty, otherwise it returns false. This is very useful in If expressions and can be used to check the content of fields.

If(IsEmpty(Field "Total Due"), "Nothing due on this account", "Bill them today!")

Left

Left(«String»,«NumberOfCharacters»)

The **Left** function returns the first NumberOfCharacters of String. This is useful for formatting fields with a fixed string length, for export to SQL or other rigid database formats.

Left("wheel to the storm and fly",5) equals "wheel"

Length

Length(«Text»)

The **Length** function returns the number of characters in Text.

Length("Read my lips") equals 12

Ln

Ln(«Number»)

The **Ln** function returns the base-e (natural) logarithm of Number. Ln is the inverse function of Exp.

Ln(2.7182818) equals 1

Ln(Exp(3)) equals 3

Log

Log(«Number»)

The **Log** function returns the base-10 (common) logarithm of Number.

Log(10) equals 1

Log(100) equals 2

Lower

Lower(«Text»)

The **Lower** function makes all the characters in Text lower case.

Lower("OWEN MEANY SAYS") equals "owen meany says"

Middle

Middle(«Text»,«StartPosition»,«NumberOfCharacters»)

The **Middle** function returns text of length NumberOfCharacters from Text starting at StartPosition.

Middle("Everything must pass",11,4) equals "must"

Middle("Hello",0,Length("Hello")) equals "Hello"

Mod

Mod(«Number»,«Divisor»)

The **Mod** function returns a number that is the remainder after Number is divided by Divisor.

Mod(21,5) equals 1

Mod(12,4) equals 0

Mod(8.5,-3.5) equals 1.5

Month

Month(«Date»)

The **Month** function returns the number of the month in Date.

Month(Field "Date") equals 3 (when the contents of the field Date are March 8, 1962)

MonthOfYear

MonthOfYear(«Date»)

The **MonthOfYear** function returns the month name of the provided date. It returns the full name, with the first letter capitalized.

MonthOfYear(Field"Date") equals "September" (when the contents of the field Date are September 18,1987

NumToText

NumToText(«Number»)

The **NumToText** function returns the text equivalent of Number. Use this when you want to place numeric values into a text field or result.

NumToText(42) equals "42"

Pi

Pi

The **Pi** function returns the value of pi, which is roughly 3.14159265358979323846.

Degrees(Pi/2) equals 90

Position

Position(«SearchForText»,«InText»,«StartPosition»)

The **Position** function returns the offset of the SearchForText within InText starting the scan at StartPosition. If this text is not found, 0 is returned.

Position("que","Albuquerque", 2) equals 5

Position("que","Albuquerque", 6) equals 9

Position("zot","Albuquerque", 6) equals 0

PresentValue

PresentValue(«Payment»,«InterestRate»,«Periods»)

The PresentValue function returns the present value (Money field type) of a series of payments, Payment, (must be a Money field type) made at regular intervals Periods, assuming a fixed interest rate, InterestRate.

If you wanted to borrow $2000 from a friend, and offered to pay her back $500 per year for five years for a total of $2500, the present value function can tell you how much that $2500 is worth in today's money given an inflation of 5%:

PresentValue(500,.05,5) equals 2164.74

Radians

Radians(«Number»)

The **Radians** function converts the supplied number to radians.

Radians(57.1) equals 1

Radians(90) equals 1.57

Random

Random

The **Random** function returns a random real number between 0 and 1.

Random might return .71

Integer(Random * 16) might return 12

Replace

Replace(«Text»,«Start»,«Size»,«ReplacementText»)

The **Replace** function takes Text and substitutes ReplacementText starting at Start position and replacing the next Size characters. ReplacementText can be longer or shorter than the specified size.

Replace("Hot Dog",4,3,"Sex") equals "Hot Sex"

Replace("ABCDEFG",4,4,"123") equals "ABCD123"

Replace("ABCDEFG",4,1,"123") equals "ABCD123FG"

Right

Right(«String»,«NumberOfCharacters»)

The **Right** function returns the last NumberOfCharacters of String.

Right("Bookkeeping",4) equals "ping"

If you had a text Field "Full Name" containing "Bill Jackson",

Right(Field "Full Name", Length(Field "Full Name") - Position(Field "Full Name", " ", 1)) equals "Jackson"

Round

Round(«Number»)

The **Round** function returns the nearest integer to the input Number.

Round(5.4) equals 5

Round(5.5) equals 6

Sign

Sign(«Number»)

The **Sign** function returns 1 if Number is positive, -1 if it is negative and 0 if it is 0.

Sign(89) equals 1

Sign(-9) equals -1

Sign(0) equals 0

Sine

Sine(«Number»)

The **Sine** function returns the sine of the Number supplied. The Number must be in radians.

Sine(1.57) equals 1.0

Sine(Radians(45)) equals .707

SquareRoot

SquareRoot(«Number»)

The **SquareRoot** function returns the square root of Number.

SquareRoot(9) equals 3

SquareRoot(2) equals 1.41421354

Tan

Tan(«Number»)

The **Tan** function returns the tangent of the angle Number supplied. The angle must be in radians.

Tan(Radians(45)) equals 1

Tan(0) equals 0

TextToDate

TextToDate(«Text»)

The **TextToDate** function returns a date formulated from Text.

TextToDate("1/1/92") equals January 1, 1992

TextToNum

TextToNum(«Text»)

The **TextToNum** function returns a numeric value based on the contents of Text.

TextToNum("12345") equals 12345

TextToNum("Apt 101") equals 101

Today

Today

The **Today** function returns the current date.

If (Today - Field "Invoice Due" > 30, "Bill Again","")

Trim

Trim(«Text»)

The **Trim** function removes all spaces from either side of Text.

Trim(" HEY ") equals "HEY"

Trunc

Trunc(«Number»)

The **Trunc** function returns a real number with no fractional parts less than or equal to the input Number.

Trunc(99.99) equals 99.00

Upper

Upper(«Text»)

The **Upper** function returns the input Text with all capital letters. This is useful for shouting.

Upper("owen meany says") equals "OWEN MEANY SAYS"

WeekOfYear

WeekOfYear(«Date»)

The **WeekOfYear** function returns the number of weeks since January 1 of the date supplied in Date.

WeekOfYear(Field"Date") equals 51 (when contents of field Date are December 25, 1991

Year

Year(«Date»)

The **Year** function returns the year component of the supplied Date.

Year(Field"Date") equals 1982 (when contents of field Date are January 16, 1982

Index

A

access controls 1-4, 6-15
    arrows 6-15
    return to all 1-7, 6-23
Access menu 9-27
access mode 1-3, 1-4, 1-3–1-5, 1-6, 1-15, 6-1
    entering 1-5
Add to Labels command 9-32
adding
    fields to database, see fields
    fields to view, see fields
    labels to fields, see fields
    labels, see label reports
    records, see records
align
    objects 5-19, 5-28
    text 5-27
Align & Distribute inspector, see inspectors
Align command 9-24
Align menu 9-23
Alignment command 9-24
All Fields & Labels command 9-18
All Fields command 9-17
All Labels command 9-17
All of Same Type command 9-18
AND, see calculated field operators, find operators
applications
    Edit 2-6, 2-7
    FileMaker Pro 2-6
    in file field 3-8
    Lotus Improv 8-5–8-7
    SQL 2-6
    transfer to DataPhile 8-7
    WordPerfect 8-3–8-5
    WriteNow 8-3–8-5
Arrange in Front command 9-35
arrow keys 6-8
arrows
    line 5-32
Auto inspectors, see inspectors

B

backing up data 1-13
backup
    automatic 9-7
    backing up data 10-5
bar codes 7-10, 9-7
Black command 9-20
Bold command 9-19
boolean, see yes/no/empty field
border
    around picture field 5-43
bounding box 5-10, 5-16
box graphic 5-14
Box Graphic inspector, see inspectors
Box Graphic tool, see tools
Bring Closer command 9-25
Bring to Front command 9-25
Button inspector, see inspectors

C

calculated field functions A-6– A-20
    Abs A-7
    Atan A-8
    Cosine A-8
    Date A-8
    DateToText A-9
    DateUpdated A-9
    Day A-9
    DayOfWeek A-9
    DayOfYear A-9
    Degrees A-10
    Exact A-10
    Exp A-10
    FileName A-10

FutureValue A-11
If A-11
InitialCaps A-12
Integer A-12
IsEmpty A-12
Left A-12
Length A-13
Ln A-13
Log A-13
Lower A-13
Middle A-14
Mod A-14
Month A-14
MonthOfYear A-14
NumToText A-15
Pi A-15
Position A-15
PresentValue A-16
Radians A-16
Random A-16
Replace A-16
Right A-17
Round A-17
Sign A-17
Sine A-18
SquareRoot A-18
Tan A-18
TextToDate A-18
TextToNum A-19
Today A-19
Trim A-19
Trunc A-19
Upper A-20
WeekOfYear A-20
Year A-20
calculated field operators
AND A-5
arithmetic operators A-3
comparison operators A-4
constants A-5
keypad operators A-3
logical operators A-5
NOT A-5
OR A-5
text operators A-5
calculated fields 3-15, 3-20–3-22, A-1–20
choosing formula for 1-5
creating a formula for 3-21
dates 3-4
defining 1-3, 3-20
deleting 3-12
formula components A-2
when to use A-1
yes/no/empty fields 3-6
card view, see view types
Center command 9-21
Check Spelling command 9-16
Clear Unsaved Finds command 9-29
Clone command 9-14
Close & Compact command 9-15
Close command 9-15
Close Window command 9-36
closing
database, see database
view, see view
color
background 5-34
background text 5-16, 5-19, 5-26
drag-on 5-46
fill 5-36
line 5-36
text 5-26
Colors command 9-33
command key equivalents 10-1
compacting 2-10
compound expressions, see find operators
Copy command 9-15
Copy Font command 9-20
Copy Record command 9-16
Copy Ruler command 9-21
copying
images (picture field) 3-7

records 6-4
sounds 3-7
Create View menu 9-21
currency types/symbols 5-41
curve 5-12
open path/closed path 5-33
Curve tool, see tools
Cut command 9-15

D

Dark Gray command 9-20
data entry 6-2
automatic 1-7
displaying/formatting 2-4
database
closing 2-10, 6-2
compacting 2-10
creating a new database 1-3, 1-5, 2-4
from import file 1-6, 1-14, 2-5–2-9
from template 1-6
defining 1-3, 3-1
definition of 2-1
naming 2-6, 2-9
open on launch 9-7
opening an existing 2-9
recreation from backup file 1-13
saving 2-9
saving a copy 2-11
Database menu 9-12
date field 3-4
calculations in 3-4
entering data into 3-4, 6-9
entry options 3-17
formatting 3-5, 3-15, 5-39, 6-9
Date field inspector, see inspectors, field
Date Marker command 9-23
default field values 3-14, 6-4
Define command 9-13
define panel 1-3, 1-5, 2-4, 3-1, 3-8, 3-9, 5-3
adding fields, see fields
defining
defining field types, see fields
deleting fields, see fields
entry options, see entry options
modifying fields, see fields
naming fields
naming fields, see fields
rearranging fields in 3-13
delete
field
from database, see fields
from view, see fields
Delete command 9-15
Delete Find command 9-29
Delete Record command 9-16
Delete View command 9-22
deleting DataPhile 10-6
delimiters, field and record 1-13, 1-14, 2-5, 2-7–2-8, 8-2
Design 1-14
Design menu 9-18
design mode 1-3–1-5, 1-10– 1-12, 1-14, 5-1
entering 1-5
preferences 9-8
distribute
objects 5-30
Duplicate Record command 9-16
Duplicate View command 9-21

E

Edit menu 9-15
Enter Design Mode command 9-18
enter key 6-3, 6-15, 9-7
entering data 1-3, 1-6, 6-7–6-12

date field 6-9
file field 6-12
money field 6-9
picture field 6-10
RTF field 6-9
sound field 6-11
text field 6-8
using entry list 6-8
value field 6-9
yes/no/empty field 6-10
entry options 1-3, 1-5, 3-2, 3-9, 3-10, 3-13–3-20
default 3-14, 6-4
must be filled in 3-15
must be unique 3-15
pop-up entry list 3-15–3-17, 6-8
range 3-18
Envelope command 9-32
envelope reports 7-1, 7-6–7-10
background graphics 7-8
barcodes 7-10
default 7-7–7-8
loading 7-7
printing 7-8
saving 7-7
size 7-7
text font 7-8
tutorial 7-8–7-10
envelopes, see envelope reports
export
all records 1-13, 10-5
as RTF 8-2
delimiters, see delimiters
subset 8-1
to Improv 8-5–8-7
to merge file 8-3–8-5
to text file 1-13, 8-1
Export All command 9-13
Export Records in View command 9-31
Export to Improv Import command 9-31
Export to Merge File command 9-31

F

field names in text (import) file 2-6
Field tool 5-2
field types 1-5, 2-3, 3-2–3-8, 3-9, 3-10
date 3-4
defining, see define panel
file 3-8
money 3-5
picture 3-6
RTF 3-4
sound 3-6
text 3-3–3-4
value 3-5
yes/no/empty 3-6
fields
adding to database 1-3, 1-11, 2-4, 3-2, 3-8, 3-10, 3-11
adding to view 1-3, 1-11, 3-11, 5-2
palette method 5-4
tool method 5-2
defining 2-7, 3-2, 3-8–3-22
definition of 2-2
deleting from database 1-3, 2-4, 3-2, 3-11
deleting from view 1-3, 5-7
formatting 5-9
grouping 5-8
indexed, see indexed fields
labels 5-5, 5-16
modifying 1-3, 3-12
modifyiong 3-12
moving 1-11, 5-5
naming 2-6, 3-2, 3-8, 3-9, 3-12
order in sort, see sort

rearranging in define panel 3-13
resizing 1-11, 5-6
Fields command 9-33
file field 3-8
default entries 3-20
entering data into 6-12
entry options 3-20
formatting 6-12
fill
graphic objects 5-36
find 1-3, 1-7–1-8, 3-2, 6-15–6-24
all records 1-7
creating find requests 1-7, 6-16
date field 3-4
deleting find requests 6-22
empty fields 6-20
field not in view 6-23
file field 3-8
from selection 6-24
in all views 6-23
in any field 6-20
instant 1-8, 6-24
multiple field specifications 6-20
operators
logical 6-18
relational 6-17
picture field 3-7
pop-up menu 1-7, 6-21
saving find requests 1-7, 1-8, 6-21–6-23
sound field 3-7
value field 3-5
yes/no/empty field 3-6
Find command 9-29
find controls 1-5, 1-7
find mode 1-3, 1-5, 1-7
entering 1-5, 6-16
exiting 6-22
find operators
AND 6-18
compound expressions 6-19
NOT 6-19
OR 6-19
Find Record In All Views command 9-30
Font menu 9-19
Font Panel command 9-19
fonts
changing 5-16
default 5-17, 9-8
envelopes 7-8
in RTF field 3-4
in text field 3-3
labels 7-3
paragraph text 5-17
RTF field 6-8
Footer command 9-23
footers 4-9
editing 4-12
page and date markers 4-14
freehand shape 5-15
open path/closed path 5-33
Freehand tool, see tools
functions, see calculated field functions

G

graphic object types
Create 5-1, 5-46
EPS 1-10, 5-1, 5-46
TIFF 1-10, 5-1, 5-46
graphic objects 5-9
adding from other programs 2-4, 5-45
adding to record body 4-14
aligning 5-19, 5-28
copying, cutting and pasting 5-17, 5-46
creating 1-3, 1-10, 2-4, 5-12
deleting 1-3, 5-18

editing 1-11, 5-46
editing paragraph text objects 5-19
grouping 1-14, 5-22
layering 5-21
locking 5-23
moving 5-20, 5-27, 5-46
nudging 5-20
resizing 1-14, 5-18, 5-27, 5-46
scaling 1-14
selecting 5-10
smart paste 5-20
Graphics inspector, see inspectors
grid 5-1
aligning objects with 5-27, 5-28
showing 5-35
size 5-35
Grid command 9-24
Grid inspector, see inspectors
Group command 9-26
grouping 1-14

H

handles
changing size of 5-10
control handles 5-15
field handles 5-6
object handles 5-10, 5-15
size 9-8
Header command 9-23
headers 4-9
editing 4-12
page and date markers 4-14
Heavier command 9-19
Help command 9-2
help, on-line 1-1–1-2, 9-2
Hide Grid command 9-24
Hide Headers command 9-28
Hide Ruler command 9-24

I

import
from Macintosh file 2-7
from other applications 8-7
from text file 1-6, 1-14, 2-5, 2-5–2-9
records 6-4
Import command 9-13
Import Records command 9-13
indents 5-17
indexed fields 1-5, 1-13, 3-2, 3-3, 3-8, 3-9
all by default 9-6
Info command 9-2
Info menu 9-2
Inspector command 9-32
inspector panel 1-12, 5-25
inspectors 1-12, 5-24–37
align and distribute 5-28
auto 1-12, 5-26, 5-35
box graphic 5-37
button 5-45
graphics 5-36
grid 5-26, 5-34
line ends 5-32
loading 1-12
nudge 5-27
paragraph text 5-37
text 5-26
inspectors, field 5-9, 5-38–5-42
date field 3-5, 5-39
loading 1-12, 1-13
money field 3-5, 5-40
picture field 3-7, 5-43
RTF field 3-4, 5-39
sound field 3-7, 5-44
text field 3-4, 5-38
value field 3-5, 5-40
yes/no/empty field 3-6, 5-42
installing DataPhile
how-to P-2–P-3
problems with 10-6

Italic command 9-19

J

K

L

label reports 2-4, 7-1
adding labels 7-5
background graphics 7-3
bar codes 7-10
creating 7-1
default 7-4
editing individually 7-3
loading 7-4
margins 7-4
number per page 7-4
order and placement of text in 7-1
printing 7-6
saving 7-3, 7-4
text font 7-3
tutorial 7-5–7-6
viewing 7-5
labels, see label reports
Larger command 9-19
Layer and Group menu 9-25
Left Align command 9-21
License command 9-4
Light Gray command 9-20
Lighter command 9-19
line 5-12
color 5-36
thickness 5-36
line cap 5-33
Line Ends inspector, see inspectors
line join 5-33
Line tool, see tools
links, see file field
Lock command 9-25

M

mail, see services
Main menu 9-1
margins 5-16, 5-17, 5-19
labels, see label reports
menus
Access menu 9-27
Align menu 9-23
Create View menu 9-21
Database menu 9-12
Design menu 9-18
Edit menu 9-15
Font menu 9-19
Info menu 9-2
Layer and Group menu 9-25
Main menu 9-1
Page Parts menu 9-22
Reports menu 9-30
Select menu 9-17
Services menu 9-37
Text menu 9-20
Tools menu 9-32
Windows menu 9-35
Zoom menu 9-34
merge, see export
Miniaturize command 9-14
Miniaturize Window command 9-36
money field 3-5
currency types/symbols 5-41
entering data into 6-9
entry options 3-18
formatting 3-5, 5-41, 6-9
Money field inspector, see inspectors, field
mouse shortcuts 10-3
moving
fields, see fields 5-5
objects 5-20, 5-27
multiple users 2-10

N

naming
  database, see database
  fields, see fields
New command 9-12
New Label command 9-22
New Labels command 9-31
New Record command 9-27
New Report View command 9-30
Next command 9-28
None command 9-17
NOT, see calculated field operators, see find operators
Nudge command 9-24
Nudge inspector, see inspectors
nudging with arrow keys 5-20

O

Open command 9-12
open path/closed path 5-33
open-import-new panel 2-4
opening
  database, see database
  view, see view
operators
  calculated field, see calculated field operators A-2
  find, see find operators
ORsee calculated field operators, see find operators
oval 5-14
Oval tool, see tools

P

Page Layout command 9-26
Page Number command 9-22
Page Parts menu 9-22
page view, see view types
paragraph text 5-16
Paragraph Text inspector, see inspectors
Paragraph Text tool, see tools
paste between databases 6-4
Paste command 9-15
Paste Font command 9-20
Paste Record command 9-16
Paste Ruler command 9-21
picture field 3-6
  background color 5-43, 6-10
  border 5-43
  borders 6-10
  calculations with 3-7
  default background 6-10
  entering data into 6-10
  entry options 3-19
  formatting 5-43, 6-10
  picture types 3-6
Picture field inspector, see inspectors, field
picture types
  Create 6-10
  EPS 6-10
  TIFF 6-10
pictures
  copy of 3-6, 5-43, 9-9
  entering 6-10
  link to 3-6, 5-43, 9-9
poly line 5-13
  open path/closed path 5-33
poly line tool, see tools
Preferences command 9-5
Previous command 9-28
printing
  date and file name 9-7
  envelopes, see envelope reports
  labels, see label reports
  records 1-3

Q

R

record body 4-11
    adding graphics to 4-14
    editing 4-12
    selecting fields in 4-13
records
    adding 1-3, 1-6, 6-2
    copying 6-4
    definition of 2-2
    importing, see import
    modifying 1-3, 6-12
    printing, see printing
    saving, see save
    sorting, see sort
    viewing as list 6-27
    viewing/browsing through 1-7, 6-12
rectangle 5-15
Rectangle tool, see tools
registering DataPhile 10-7
report view, see view types
reports 2-4
    envelopes, see envelope report
    labels, see label report
    printing 4-3
Reports menu 9-30
return key 6-3, 6-15
Return to Access Mode command 9-18
Revert Record command 9-16
Rich Text field inspector, see inspectors, field
Right Align command 9-21
round box 5-14
Round Box tool, see tools
RTF field 3-4
    entering data into 6-9
    entry options 3-17
    formatting 3-4
ruler
    showing/hiding 5-17
ruler units 9-8

S

save 1-6
    automatic 6-3
    copy of database, see database
    database, see database
    envelopes, see envelope reports
    find request, see find
    labels, see label reports
    records 6-3
Save As/Save To commands 9-14
Save Find command 9-29
Save Record command 9-27
Save Sort command 9-28
scaling 1-14
scrolling fields 3-4, 5-38, 5-39, 6-3, 6-8
search criteria, see find
search, see find
Select All command 9-17
Select menu 9-17
selecting objects 1-11, 1-14, 5-2, 5-10
Selection tool 5-2
Send Further command 9-25
Send to back command 9-25
services
    mail 8-8
Services menu 9-37
Show as Card command 9-34
Show as Report command 9-34
Show Grid command 9-24
Show Headers command 9-28
Show menus command 9-9
Show Ruler command 9-24
Smaller command 9-19
smart paste 5-20
sort 1-3, 1-8–1-9, 3-2, 3-3, 6-24–6-27
    changing 1-8

date field 3-4
deleting 6-26–6-27
executing 1-8
file field 3-8
multi-level requests 6-25
picture field 3-7
pop-up menu 6-26
saving sort requests 1-9, 6-26–6-27
sound field 3-7
text field 3-3
value field 3-5
yes/no/empty field 3-6
Sort command 9-28
sound field 3-6
calculations with 3-7
entering data into 6-11
entry options 3-19
formatting 5-44, 6-12
Sound field inspector, see inspectors, field
ounds
copy of 3-6, 5-44, 9-9
entering 6-11
link to 3-6, 5-44, 9-9
Spelling command 9-16
straight line 5-12
Straight Line tool, see tools
subscript 5-16, 5-19
Subscript command 9-20
Suggestion Box command 9-11
summaries 8-6–8-7
superscript 5-16, 5-19
Superscript command 9-20

T

tab key 1-6, 1-14–1-15, 6-3
tab order 1-14, 5-2, 5-7, 6-28
tab-delimited text, see delimiters
tabs 5-16
in paragraph text 5-17
templates 1-6
Templates command 9-12
text field 3-3–3-4
entering data into 6-8
entry options 3-14
formatting 3-4
Text field inspector, see inspectors, field
text file
exporting to, see export
importing from, see import
Text inspector, see inspectors
Text menu 9-20
today's date 6-9, A-18
tool palette 1-10, 1-11, 5-9
tools
Box Graphic 5-14
Curve 5-12
Field 1-11
Freehand 5-15
Line 5-12
Oval 5-14
Paragraph Text 5-16
Poly Line 5-13
Rectangle 5-15
Round Box 5-14
Selection 1-11
Straight Line 5-12
Tools command 9-33
Tools menu 9-32
Turn Grid Off command 9-24
Turn Grid On command 9-24

U

Underline command 9-19
Undo command 9-16
Ungroup command 9-26
Unlock command 9-25
Unscript command 9-20
Unused Fields dialog box 5-3
Unused Fields palette 1-11, 5-4
unused fields panel 5-18

V

value field 3-5
  entering data into 3-5, 6-9
  entry options 3-18
  formatting 3-5, 5-40, 6-9
Value field inspector, see inspectors, field
view
  adding fields to, see fields
  closing 2-10, 6-2
  creating a new view 1-3, 1-10, 2-4, 4-6
  default 1-9, 3-9, 3-11, 6-2
  definition of 2-4
  deleting fields from, see fields
  designing 1-10, 2-4, 5-1–5-47
  editing 1-10
  loading/opening 1-9, 6-2
  naming 1-9
  resizing 5-6, 5-46
  role of 2-4, 4-1
View All Records command 9-30
view browser 1-9, 1-13
  closing 2-10
  loading/opening views with 1-9, 5-2, 6-2
  naming views with 1-9
  open on launch 9-7
View Browser command 9-35
view types 4-3
  all fields 4-2, 4-8
  blank 4-7, 5-2
  card 1-10, 3-9, 4-3
    printing 4-3
  page 1-10, 4-3
    printing 4-3
  report 1-10, 4-3
    printing 4-3
viewing data 1-3, 1-7, 1-15, 2-4, 6-1, 6-12
  as list 6-27
voice annotation 6-28
Voice command 9-33

W

White command 9-20
Windows menu 9-35

X

X DocumentName command 9-36

Y

yes/no/empty field 3-6
  calculations with 3-6
  default value 3-19, 6-10
  entering data into 6-10
  entry options 3-19
  formatting 3-6, 5-42, 6-10
Yes/No/Empty field inspector, see inspectors, field

Z

zoom 5-23
Zoom menu 9-34